Title 22, Ch. STATE OF CALIFORNIA MAIN OFFICE SACRAMENTO 616 K STREET Department of Social Welfare 14 LOS ANGELES OFFICE MIRROR BUILDING MYRTLE WILLIAMS 145 SOUTH SPRING STREET DIRECTOR ADDRESS REPLY TO: Sacramento 14 SAN FRANCISCO OFFICE January 30, 1950 GRAYSTONE BUILDING 948 MARKET STREET FILED in the Office of the Secretary of State Hon. Frank M. Jordan of the State of California Secretary of State Room 109, State Capitol Sacramento, California Dear Mr. Jordan: Attached are three copies of the following regulations issued by the State Department of Social Welfare. DEPARTMENT BULLETIN NO. 398 Subject: Assignment of State Numbers DEPARTMENT BULLETIN NO. 399 Subject: Financial Procedures with Respect to OAS. ANB, and APSB Effective Immediately and Operative March 1, 1950 DEPARTMENT BULLETIN NO. 400 Subject: Procedure for Handling Physician's Report of Eye Examination-APSB, SB These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 2140, 3075, and 3460 on January 26, 1950. These regulations are to be effective immediately upon filing

These regulations are to be effective immediately upon filing with the Secretary of State, and operative on March 1, 1950, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

Department of Social Welfare

468:b5
Attachments

Certified as a Regulation (or Regulations) of the

(Name of State Agency)
(Name of State Agency)
Wurtlew Plania
(Signature)
(Title)
(Title)
1-30-50
(Date)

MYRTLE WILLIAMS

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE FILED

616 K STREET SACRAMENTO 14 January 30, 1950

in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO. 398 (OAS, BL)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS
DISTRICT OFFICES SDSW

FEB 1 1950

FRANK M. ORDAN, Secretary of State

Subject: Assignment of State
Numbers

The procedure for assignment of state numbers to OAS and BL applications (see Manual Sections 700-00 and 700-05) is hereby revised. Effective March 1, 1950, the counties shall assign the state number to each application at the time it is taken instead of after it has been granted by the board of supervisors. Thus each application (Form AG/BL 200) which has been signed by an applicant regardless of subsequent action—whether withdrawn by applicant, cancelled, or acted upon by the board of supervisors (denied or approved)—will carry a state number. A copy of all such applications carrying state numbers shall be submitted to the State Department of Social Welfare.

Effective March 1, 1950, state numbers for applications for Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents shall be combined into the same series and suffixed BL, thus superseding the instructions issued in Department Bulletin #368 (SB, APSB), which bulletin is hereby cancelled. Any county which has assigned APSB numbers to new APSB cases (as outlined in Bulletin #368) shall renumber these cases, and assign the next consecutive BL number after the two series have been combined. Notification of these changes in numbers shall be submitted to this department.

Case numbers under state operation were assigned consecutively starting from the numbers already used by the counties but, instead of the abbreviation of the county name, were prefixed by the State Department of Social Welfare office numbers.

Examples

or

Case No. 1345 AG

Office No. 740

Under county administration, the prefix indicating the name of the county shall be used instead of the number which indicated the SDSW office under State administration.

8、20、20A提供的對為AAPO 1912的實行的有效。 FILED in the Order of the Secretary of State Sale, of Standard and the State of California 0841 F 000 Difference in the early with the gift (i.e., pr.) SOUTH THE SHOULD SEE TO SHEET A FRANK M JOHDAN, Secretary of Byte CHARLES CHOINE SUBME We In tally him and application P. CHOMPALHON :3001/110 edada ao desara kuda Physicactions for programmed of the contract the section of the section of and the training the second electrics in the last proposition is become one and a constant, and colors a Linia restauce with . La la company de la comp La la company de ere tradic construct at the most reclaim to be to be no policied an entreprise to become to report the commendation in the entrangence of the content of th grade and of bed forms of trans endanger enter the Left of the property ្នាក់ នៅ ប្រាស់ នៅ ខេត្ត ខេត្ត នៅ ខេត្ត ប្រាស់ ខេត្ត នៅ ខេត្ត ខេត្ត ខេត្ត ប្រាស់ ខេត្ត ខេត្ត ខេត្ត ខេត្ត ខេត្ត ខេត្ត ខេត្ត ប្រាស់ ខេត្ត នៅ នៅ ខេត្ត ខ neer al done en constanting en en region en en en difficulté de la flagge en le la Alegne en diffic La algebra plan escapato de la collecte en en algebra de la flag flag flag en la company de la collecte de la and the testing and many consideration and the state of the state of the state of the consideration of the consideration of the state of the constant of the c midelute as toutless to be an about you so endine abus boilties in about the . sedika nastikut da digiraksi para ekan end utaksak basa pesana sesad^an palabasi tilinda 1885. Linux tracker at acqueste resta ils notascittado contento de despetado estado de la contenta de la contenta de be authorized to interdupercrant. Control of the control of phiorist givite carros believes com acros comesants estar estar estar estar. to militaivens a tera to inserted , and estimion a transfer encials excises all mort the bidder care, vers are their by the State Department of Cociet Wellers of the DA BIET LOS GUED CPY .ON GOITIC theer county attended by the bound of the test will be the county attended to unclimated at the proper which indicested the STEN cities ander State address ton. Under State administration where there was more than one local state office in a county, consecutive blocks of numbers were issued to each local office for assigning to new applications. Therefore, in these particular counties there will be gaps in the number sequences depending upon the size of the blocks and the numbers used in each. The numbers within these gaps that have not been assigned shall be used before starting from the largest number issued.

The rest of the procedure for the assignment of state numbers as described in the Manual of Policies and Procedures remains in effect.

Sections 700-00 and 700-05 of the Manual of Policies and Procedures are adopted, as revised by the State Social Welfare Board on January 27, 1950, effective and operative March 1, 1950.

11+18 22Ch.2

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Title) - 30 -(Date)

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FILED

616 K STREET
SACRAMENTO 14
January 31, 1950

in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO. 400 (SB, APSB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS
DISTRICT OFFICES SDSW

4:32 o'clock P. M.

FRANK MORDAN, Secretary of State

Subject:

Procedure for Handling Physician's Report of Eye Examination - APSB, SB

I. PHYSICIAN'S REPORT OF EYE EXAMINATION - FORM BL 227

The Physician's Report of Eye Examination (Form Bl 227), revised July 1949, provides for information as to the type of aid, i.e., Security for the Blind (Aid to Needy Blind after 3/1/50) or Aid to Partially Self-supporting Blind Residents, and the status of the case, i.e., new application, reapplication, or reinvestigation. It is helpful for the Division for the Blind to have this information on the Physician's Report of Eye Examination (Form Bl 227).

The supply of Form Bl 227, Physician's Report of Eye Examination, now on hand may be used until exhausted; when a new supply is ordered for distribution, the initials SB (Security for the Blind) will be changed to ANB (Aid to Needy Blind). The Physician's Report of Eye Examination (Form Bl 227) shall be completed in ink or typewritten by the physician making the examination. All information should be completely filled in to avoid return of the report by the State Opthalmologist for additional information.

II. NOTICE OF FINDINGS AND ACTION ON PHYSICIAN'S REPORT OF EYE EXAMINATION - FORM BL 263

Attached is a copy of Form Bl 263, Notice of Findings and Action on Physician's Report of Eye Examination. Effective February 1, 1950, this new form will replace the following forms which have heretofore been used by the Division for the Blind in notifying counties of the findings of the State Ophthalmologist on review of the Physician's Report of Eye Examination:

Form Bl M506 - Notification to County of Action on Physician's Report of Eye Examination

Form Bl M515 - Notification to County of Necessity for Re-examination

and

the following forms which were used under State disbursement and/or administration:

Form Temp 353 Bl - Notice of Findings on Physician's Report of Eye Examination

Form Temp 353A Bl - Notice of Findings and Action on Physician's Report of Eye Examination

A check mark in the appropriate box or boxes in the upper section of Form Bl 263, Notice of Findings and Action on Physician's Report of Eye Examination, will indicate the findings of the State Ophthalmologist on review of the Physician's Report of Eye Examination. The form, when signed by the State Ophthalmologist, will be an official document on which to take action as indicated with regard to degree of blindness.

The lower section of Form Bl 263 will be checked only when eligibility with regard to degree of blindness is questioned and/or clarified as a result of the findings of the State Ophthalmologist and will be notification of action required. Thus, in addition to replacing the forms Bl M506, Bl M515, Temp 353 Bl and Temp 353A Bl, it will also replace several form letters which have heretofore been used by the Division for the Blind when eligibility was questioned and/or clarified with regard to degree of blindness.

III. NEW APPLICATIONS - PROCEDURE FOR DETERMINING DEGREE OF BLINDNESS

An eye examination by a duly licensed and practicing physician who is skilled in diseases of the eye is required by law to establish eligibility insofar as degree of blindness is concerned. Such an examination not only establishes whether an individual is blind, but also provides information as to medical and social requirements which should be considered in determining need. The eye examination should, therefore, precede determination of need.

All eye examinations shall be made by a physician whose name appears on the list of approved examiners. (See Manual Section 180-15, Determination of Degree of Blindness). The applicant shall be given the opportunity of selecting from the list of approved examiners the physician whom he desires to make the examination. The social worker shall give any needed assistance in making an appointment with the physician selected and request the physician to return the completed Physician's Report of Eye Examination to the office handling the application.

When the examining physician returns the completed Physician's Report of Eye Examination (Form Bl 227), one copy shall be immediately submitted to the State Department of Social Welfare, Division for the Blind, 145 South Spring Street, Los Angeles, for review by the State Ophthalmologist and processing.

When the Physician's Report of Eye Examination has been reviewed by the State Ophthalmologist, his findings on degree of blindness will be recorded on the Notice of Findings and Action on Physician's Report of Eye Examination, (Form Bl 263). One copy of Form Bl 263 will be sent immediately to the office wherein the application is pending and will be sufficient evidence of degree of blindness on which to take action according to the findings of the State Ophthalmologist. When action has been taken on the application, Form Bl 263 will be filed in the case record.

No separate document concerning degree of blindness will accompany the Application and Certificate of Eligibility. Instead, there shall be recording by the worker on the Certificate of Eligibility opposite "Blindness" as follows: "Form Bl 263, dated , shows eligible (or ineligible) on basis of eye examination by Dr. James Roe (date)."

The Physician's Report of Eye Examination will be retained in the Division for the Blind until a photostatic copy has been made, after which the Physician's Report will be stamped "File Copy" and returned to the office from which it originated for filing in the case record. Action on the application shall not be withheld pending the receipt of the "File Copy" of the Physician's Report of Eye Examination.

IV. REINVESTIGATION - PROCEDURE FOR REINVESTIGATION OF DEGREE OF BLINDNESS

The required annual investigation of the qualifications of recipients of Aid to Needy Blind or Aid to Partially Self-supporting Blind Residents includes a re-examination of the eyes unless authorization has been given by the State Ophthalmologist to dispense with further examination. Such authorization by the State Ophthalmologist is based upon information contained in the Physicians' Reports of Eye Examinations on file and is recorded on the Form Bl 263, Notice of Findings and Action on Physician's Report of Eye Examination.

Eye examinations by at least two different examiners are required before the State Ophthalmologist is able to say that no further eye examination is necessary in any case.

It is preferable that re-examination, when required, be made by a physician other than one who had previously examined the recipient.

The same procedure as outlined herein under Item III with regard to the securing and handling of Physicians' Reports of Eye Examination will be followed except that the information is recorded on Form Bl 206 instead of Bl 201.

Counties under contract with the State Department of Social Welfare were formerly notified as to the need for further eye examination by "Notification to the County of Necessity for Re-examination," Form Bl M515; while those in which there was State disbursement and/or administration were notified by Form Temp 353 Bl or Temp 353A Bl. At the time of reinvestigation, the necessity of re-examination of the eyes shall be determined by whichever of these forms is the most recent in the case record.

V. REAPPLICATION - PROCEDURE FOR DETERMINING DEGREE OF BLINDNESS

If Aid to Needy Blind or Aid to Partially Self-supporting Blind Residents has been discontinued for one year or more, a decision may be requested from the Division for the Blind, 145 South Spring Street, Los Angeles, as to the need for a current report of eye examination.

The same procedure for handling of the Physician's Report of Eye Examination (Form Bl 227) as outlined herein under Item III is applicable.

VI. SUCCESSIVE EYE EXAMINATION REPORTS

To finally determine eligibility as to degree of blindness in some instances, it is necessary to secure a second and, at times, a third report of eye examination. This is necessary in connection with appeals based on degree of visual impairment when continued eligibility is questioned on the basis of an eye examination, and in other instances when the Department requires additional eye examination.

Procedure in the Manual of Policies and Procedures which is in conflict with the provisions of this bulletin is hereby superseded.

NOTICE OF FINDINGS AND ACTION ON PHYSICIAN'S REPORT OF EYE EXAMINATION

Report of DrCase Name					
Date of Eye Examination Case Number Bl Date					
	I.	Eligible on basis of degree of blindness.			
		Re-examination necessary at time of annual reinvestigation.			
		Re-examination necessary			
		Re-examination not necessary at time of annual reinvestigation, except as outlined in Manual Sec. 180-50.			
0	Ineligible on basis of degree of blindness.				
		Usual acuity exceeds department's definition of blindness.			
		Examining physician questions degree of disability.			
		Examination by another examiner requested.			
		Examination by State Ophthalmologist requested.			
O	III. Action on this report withheld.				
		Examining physician questions degree of disability.			
		Other reason			
* * *	* * * *	Signature of State Ophthalmologist *********************			
clar	ified wi	This section is used only when eligibility is questioned and/or th regard to degree of blindness by findings above.			
	1.	Withhold grant for month of(See Manual Secs. 361-40 and 180-20).			
	2.	Release grant for month ofif otherwise eligible.			
	3.	Refer for additional eye examination. (See Manual Sec. 361-40).			
	4.	Refer to Drfor confirming examination and forward attached report/reports to him.			
	5.	Refer to State Ophthalmologist for examination.			
	6.	Discontinue grant.			
		Perry Sundquist, Chief Division for the Blind			

Title 22, Ch, 2 STATE OF CALIFORNIA Department of Social Welfare MYRTLE WILLIAMS DIRECTOR Sacramento 14

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

GRAYSTONE BUILDING 948 MARKET STREET

SAN FRANCISCO OFFICE

Hon. Frank M. Jordan

Secretary of State Room 109, State Capitol Sacramento, California

January 30, 1950

ADDRESS REPLY TO:

FILED

in the Office of the Secretary of State of the State of California

1 1950

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 401 Subject: Special Dividend Payable on National Service Life Insurance Considered Personal Property

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 1560, and 3460 on January 26, 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, and operative on March 1, 1950, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

Department of Social Welfare

468: 55 Attachments Certified as a Regulation (or Regulations) of the

Dept. of Social Welfare (Name of State Agency)

Director (Title) 1-30-50

(Date)

MYRTLE WILLIAMS DIRECTOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE, In the Office of the Secretary of State of the State of California

SACRAMENTO 14 January 31, 1950

1 1950

BRDAN, Secretary of State

COUNTY WELFARE DEPARTMENTS LOS ANGELES JUVENILE COURT SAN FRANCISCO JUVENILE COURT

DEPARTMENT BULLETIN NO. 401 (ANC, APSB)

TO: COUNTY BOARDS OF SUPERVISORS

COUNTY AUDITORS

Subject: Special Dividend Payable on

National Service Life Insurance Considered Personal Property

Payments of a special dividend from the National Service Life Insurance Fund are now being made by the Veterans Administration. Servicemen and veterans who held wartime insurance which was in force for 90 days or more or who now hold insurance under the National Service Life Insurance Act, the guardian of any incompetent insured veteran, and the beneficiaries of any deceased serviceman, may apply for the special dividend. The maximum amount payable is \$528.

Veterans may apply on forms available at post offices and offices of the Veterans Administration. Guardians of incompetent veterans should apply by letter addressed to Special Dividends Applications Unit, Veterans Administration, Washington 25, D. C. Beneficiaries currently receiving insurance payments or who have been paid completely will receive the special dividend without application. Other beneficiaries will be furnished application forms from the Veterans Administration without request.

For ANC purposes, this special dividend shall be considered to be personal property. In every case wherein the parent was or is an insured veteran, the parent was or is the beneficiary of an insured veteran, or a child was or is the beneficiary of an insured veteran, the receipt of the special dividend is anticipated.

For APSB purposes this special dividend shall be considered in the statutory limitation of \$3500 on combined real and personal property. In every case wherein the applicant or recipient was, or is, an insured veteran or the beneficiary of an insured veteran the receipt of the special dividend is anticipated.

Payments will be made during the next several months. The date of payment or the amount of payment cannot be ascertained until payment has been made. The payee will be the source of information both as to date and amount of payment.

The ANC and APSB case loads shall be promptly reviewed to determine which cases may be affected by the receipt of the special dividend. ANC recipients should be reinformed that total personal property in excess of \$600 will cause ineligibility. APSB recipients should likewise be reinformed that total personal and real property (excepting those items specifically excluded in the W&I Code) in excess of \$3500 will cause ineligibility.

Certified as a Regulation (or Regulations) of the

(Name of State Agency)

(Name of State Agency)

(Signature)

Queston

(Title)

1-30-50

(Date)

Title 22, Ch.

MAIN OFFICE SACRAMENTO 616 K STREET

Department of Social Welfare

STATE OF CALIFORNIA

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

MYRTLE WILLIAMS Sacramento 14

ADDRESS REPLY TO:

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

January 30, 1950

FILED

in the Office of the Secretary of State of the State of California

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

Manual	Section	073-21 - Transfer to County Agencies 074-15 - Provisional Appointments	
		074-30 - Emergency Appointments	
# 1	11	362-40 - Discontinuance of Aid to the Individual Recipient Section II, of Notice of Change, OAS	
**	tt .	362-45 - Discontinuance of Aid to the Individual Recipient, Section II, of Notice of Change, ANB, APSB	
11	11	700-00 - Assignment of State Numbers, OAS	
11	11	700-05 - Assignment of State Numbers, ANB, APSB	
11	11	610-20 - Time of Payment	
11	11	611-40 - Signature Card File, Deleted	
11	11	611-70 - Retroactive Initial Payments	
tt .	11	626-60 - Identification on Aid Pay Rolls	
11	11	627-30 - Federal Participation	
11	11	645-21 - Expenditures for Goods, Facilities, and Services from Other County Agencies	
11	11	645-27 - Expenses of the County Auditor	
11	11	645-96 - Reporting of Cost of Administration	

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 2140, 3075, and 3460 on January 26, 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, and operative on March 1, 1950, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

MYRTLE WILLIAMS, Director Department of Social Welfare

468:b5 Attachments In accordance with Chapter 10, Statutes 1949, first extraordinary session, each employee of the SDSW on February 28, 1950, who was appointed to his position in the State Department of Social Welfare in accordance with the provisions of Section 18598 of the Government Code and subdivision (b) of Section 107 of the Welfare and Institutions Code shall be reemployed by the county by which he was employed immediately prior to such state appointment when that county resumes the functions of clarge and blind security. He shall receive the same classification, salary, rights, seniority, and status as a probationary or permanent employee that he last had in such county, except:

- (a) Time served in such state employment shall be applied toward completion of any probationary period.
- (b) Each employee shall receive the sick leave and vacation credits that he had accumulated as of the time he accepted state employment, less any sick leave or vacation taken or paid for after his separation from county service.
- (c) For the accumulation of credits for vacation, sick leave, seniority, and salary adjustment, time spent in state service shall be credited to such an employee, but in no event shall such credits exceed the credits to which the employee would be entitled if he had rendered like service to the county and in no instance shall this balance be less than zero.

The SDSW shall be notified by the appointing authority on Form PS-20 (Notice of Appointment) of each employee who has transferred from the State service to a county welfare department under the provisions of Chapter 10, Statutes 1949, 1st extraordinary session.

If, as a result of the reemployment of such persons, a layoff among the employees of a county welfare department is made necessary, such layoffs shall be made in accordance with provisions of Manual Section 076-05 (Reduction in Force), except that in computing seniority for layoff purposes persons who accepted state employment under the provisions of Section 18598 of the Government Code or subdivision (b) of Section 107 of the Welfare and Institutions Code shall be given credit by the county for the period during which they were so employed by the State Department of Social Welfare, as though the time had been spent in county service.

The State Social Welfare Board-shall insure compliance with the provisions of this section to the end that the State of California at all times conforms to the requirements of Federal law for the continued receipt of Federal grants-in-aid for the administration of public assistance and/or child welfare services programs,

The provisions of this section shall become operative on Merch 1, 1950,

074-15 PROVISIONAL APPOINTMENTS
WPS

074-15

If, in the opinion of appointing authority, there are urgent reasons for filling a position and there are no eligibles on any appropriate employment list, appointing authority may submit to SDSW on Form PS-16 (Statement of Qualifications for Provisional Appointment) the name of the person to fill the position pending examination and establishment of an eligible list. If such person's qualifications have been certified by examining agency as meeting minimum requirements as to training and experience for the position, and he is a citizen of the United States, such

The recondence with Chapter 10, Statebook Lynd, First extracted with the SNEW on Nebrusty 20, 1950, the was appellated to his a solid in the SNEW on Nebrusty 20, 1950, the was appellated to his a solid in the Newton Court Slens of Solid in the Newton Court Slens of Solid in the Newton end subdivision (b) at deciden 108 of the Newton English the Lord Solid in the Newton end in the State of Solid in the Newton State of State Solid in the Solid in the Solid in the Solid in Solid in the Solid in Solid in Solid in the Solid in Solid

- (a) Tire served in such seale enlighment and the septiod toward completes, and probabilished period.
- (b) Each employee shall receive the sick leave and vacables true to but administrated as of the time to new the state employment, here any sink terms or manufact news or paid for after his expension from county nervice.
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OPI-13 PROVISIONAL APPOINTEMENTS.

635- 13

if, in the opinion of appointion indicative, there are argent receives for filling a position and there are no calcibles on any copropriate explay out list, appointing authority may submit to SDOM or Hern FG-16 (Statoment or Amelifications for explaint authority may submit to SDOM or Hern FG-16 (Statoment or Amelifications for explaint any interest of the reme of the passing of the position provided may appoint a few colleges. If such percent in its interest has a position as to explain the tree continues as to continue and the figure for the finite for the finite of th

person may be provisionally appointed to fill existing vacancy only until an appropriate eligible list is established and appointment made therefrom. No provisional appointment shall be made until the position has been classified and minimum qualifications established therefor, in accordance with these rules. No provisional appointment shall be continued for more than ninety (90) days after an appropriate eligible list has been established for the class of position and in no event for more than six (6) months from date of appointment; except that when a provisional employee has filed a relevant examination appeal which is granted a hearing by the SSWB, his appointment may continue during the pendency of such appeal in accordance with the provisions of the rules governing provisional appointments. Successive provisional appointments of same person shall not be permitted and a position shall not be filled by repeated provisional appointments. Expiration of a provisional appointment shall be reported to SDSW on Form PS-21 (Report of Separation).

The period of provisional appointment shall not constitute a part of the probationary period except as provided in Sec. 074-50, Probationary Period. Employees not covered by Sec. 074-10, Employees Appointed Prior to Adoption of These Rules, and all appointments made subsequent to the adoption of these rules but prior to the holding of examinations, shall be regarded as provisional employees.

For the duration of the war emergency, provisional appointments may be extended at the end of the six months' period with the approval of the SDSW, and successive provisional appointments of the same individual to different positions and successive provisional appointments to the same position may be made in exceptional circumstances subject to the following conditions:

- 1. That an examination has been publicly announced or will be announced by the examining agency prior to a date not exceeding six months after the beginning date of each provisional appointment, or that if after an examination has been announced the examining agency has found that a sufficient number of applicants has not filed to assure adequate competition.
- 2. That in the absence of a definite examination date, provisions shall be made to accept continuous receipt of applications for an examination for a given class as outlined in Sec. 071-80, Filing Applications, and the examination is to be held whenever the examining agency, with the concurrence of the SSWB, finds that enough applicants have filed to assure adequate competition.
- That, where there is an established eligible list for a given classification but there are no immediately available eligibles for appointment, the SDSW may approve the extension of a provisional appointment in accordance with the provisions outlined under (1) and (2).

A permanent or probationary employee who has accepted a provisional appointment in a higher class shall, if he so desires, at the termination of the provisional appointment be reinstated to his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position. (W&IC 119.5, 119.6, FSS-Admin.)

074-30 EMERGENCY APPOINTMENTS
WPS

074-30

Whenever an emergency exists which requires the immediate services of one or more persons and it is not possible to secure such persons from appropriate eligible

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ANTER LEGISLATION DE L'EXPERT POUR L'EXPERT DE LA COMPANIE DE L'ARTER L'EXPERT DE L'ARTER L'EXPERT DE L'ARTER L L'ARTER L'EXPERT L'E lists, appointing authority may appoint a person or persons without regard to other provisions of these rules governing appointments, except that all persons appointed on an emergency basis must be citizens of the United States. In no case, however, shall an emergency appointment continue for a longer period than ninety (90) days in any twelve-month period unless approved by SDSW. Each emergency appointment shall, when appointment is made, be reported to SDSW by appointing authority on Form PS-20 (Notice of Appointment). When emergency appointment terminates the SDSW shall be notified by appointing authority on Form PS-21 (Report of Separation.)

A permanent or probationary employee who has accepted an emergency appointment in a higher class shall, if he so desires, at the termination of the emergency appointment be reinstated to his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position. (W&IC 119.5, 119.6; FSS-Admin.)

(a)

362-40 DISCONTINUANCE OF AID TO THE INDIVIDUAL RECIPIENT, (Rev.) SECTION II, OF NOTICE OF CHANGE OAS

- Item A. Date ineligibility discovered—Enter the date on which the facts causing discontinuance of aid to the recipient came to the attention of the county.
- Item B. Date of last previous county investigation—Enter the date on which the county investigation preceding the one resulting in discontinuance of aid to the recipient was completed.
- Item C. Reason for discontinuance of aid to recipient—Check the all applicable reasons for discontinuance which appears first on the list. For example, if earnings of spouse (Item C3) and contributions from adult children (Item C5) result in the discontinuance of a case, check earnings of spouse, both Item C3 and Item C5.
- Item Cl. Death—Check if aid was discontinued because of the death of the recipient. Write in the date of death; e.g., 1/16/47. If death occurred in a county hospital or other public institution enter the date of admission under Item Cl3, Cl4, or Cl5, whichever is applicable.
- Item C2. Earnings of recipient—Check if aid was discontinued because of earnings of the recipient (including earnings from self-employment).
- Item C3. Earnings of spouse—Check if aid was discontinued because of the receipt of support from earnings (including earnings from self-employment) of recipient's husband or wife whether or not the earnings were considered community property.
- Item C4. Other resources of spouse—Check if aid was discontinued because of support from separate income of the spouse; i.e., rental of spouse's separate property, or separate income from any source other than earnings of the spouse.
- Item C5. Contributions from adult children—Check if aid was discontinued because of the receipt of support from adult children.

(Portions of this section not relative to the change are omitted from this agenda).

⁽a) Change in policy.

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- Item A. Date ineligibility discovered—Enter the date on which the facts causing discontinuance of aid to the recipient came to the attention of the county.
- Item B. Date of last previous county investigation—Enter the date on which the county investigation preceding the one resulting in discontinuance of aid to the recipient was completed.
- Item C. Reason for discontinuance of aid to recipient—Check the all applicable reasons for discontinuance which appears—first on the list. For example, if earnings of spouse (Item C3) and contributions from parents or adult children (Item C5) result in the discontinuance of a case, check earnings—ef spouse, both Item C3 and Item C5.
- Item Cl. Death—Check if aid was discontinued because of the death of the recipient. Write in the date of death; e.g., 1/16/47. If death occurred in county hospital or other public institution, enter the date of admission under Item Cl4, Cl5, or Cl6, whichever is applicable.
- Item C2. Earnings of recipient--Check if aid was discontinued because of earnings of the recipient (including earnings from self-employment).
- Item C3. Earnings of spouse—Check if aid was discontinued because of the receipt of support from earnings (including earnings from self-employment) of recipient's husband or wife whether or not the earnings were considered community property.
- Item Ch. Other resources of spouse-Check if aid was discontinued because of support from separate income of the spouse; i.e., rental of spouse's separate property, or separate income from any source other than earnings of the spouse.
- Item C5. Contributions from parents or adult children—Check if aid was discontinued because of the receipt of support from parents or adult children.

(Portions of this section not relative to the change are omitted from this agenda)

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. 610-20 TIME OF PAYMENT (Rev.) OAS, ANB, APSB, ANJ

Payments of aid shall be made by county warrant monthly in advance, except payments of ANC for children who are living in boarding homes or institutions. Payment of ANC for such children may be made to the boarding home or institution either in advance or subsequent to the furnishing of care and support. One warrant may be issued to each boarding home or institution covering all children in the home to whom board and care is given during the month, or a separate warrant may be issued for each child or family group. (See Secs. 610-40, Recipient of Payment, 611-60, Initial Payments, and 361-25, Retroactive Aid Payments by County.)

Payment is effected by deposit of the warrant, properly stamped and addressed, in the United States mail, or by delivery to the recipient or payee by an authorized representative of the county. Finchosures with warrants so mailed or delivered are restricted to those matters relating to administration of the program to which the warrant refers. Any other material which a county may desire to enclose with a warrant requires prior SDSW approval.

(a)

Advance payment means delivery of the warrant on or as near as possible to the first business day of the month as compliance with state and county regulations will permit; however, the warrant should not be deposited in the mail for delivery prior to the first day of each respective month.

All warrants shall be clearly marked to show the date of issuance. When the delivery date is other than the date of issuance shown on the warrant, the date of delivery shall be shown either on the warrant or on a separate record which shall be available for inspection by the SDSW.

If a recipient is eligible on the first day of the month, he is entitled to receive payment for the full month, even though his status changes at some time during the month. (See Sec. 611-00, Payment When Grantee Dies.)

The state, federal, and county portions of the aid shall be paid at one time by a single warrant. (W&IC 1550, 1552, 1556.5, 1558, 1560, 2140, 2160.6, 2182, 2182.1, 2183, 2183.9, 3044, 3075, 3082, 3084, 3444, 3460; FSS-Admin.)

⁽a) To include in the Manual a statement of existing policy.

The following precedure is recommended: A signature eard file should be maintained in the county to verify endersements on warrants. — In OAS, ANB, and APSB, the signature and name on the card should agree with that on the application (Form Ag, Bl -200, Bl -200a) or summary of Letters of Guardianship (Form BPA-5). — In ANC, the signature on the eard should agree with that on the application (Form CA -200) or Notice of Change (Form CA -232). — When a mark (an X-er thumb print) is used on the application, the same method should be used on the signature eard. — When administratively possible, the signature of any person who regularly acts as witness to a mark should be in this file. — Such a file protects both recipients and the county in detecting forgeries on lest and stelen warrants through comparison of endersement with the signature eard. (WHE 1560, 2140, 3075, 3440)

Initial grants of aid shall be paid for months prior to action by the board of supervisors on an application in the following instances: (see Sec, 361-25, Retroactive Aid Payments by County)

- 1. If aid is granted on appeal by the SSWB or by the board of super-visors.
- 2. If the SDSW concurs in a county recommendation that retroactive aid be paid. (See Sec. 325-42, Stipulated Appeals.)
- 3. If retroactive aid is granted because an application for aid has been improperly denied and such action is later rescinded. (See Secs. 611-50, Beginning Date of Aid-New Applications, and 201-25, When Application to be Taken).
- 4. In OAS, if aid is conditionally restored after discontinuance due to employment and the board of supervisors acts to restore aid conditionally in the month following that in which the 30-day period ended.
- Example: An OAS request for restoration after discontinuance due to employment is signed on February 25; the investigation is not completed on March 27. The next board of supervisors' meeting on April 5. On this date the board of supervisors approves conditional restoration of aid as of March 1.
- 5. If retroactive aid is granted because the investigation is not completed by action of the board of supervisors within 60 or 90 days after application is made. (See the following paragraphs in this section.)

In OAS if the investigation has required more than 60 days on new applications and in ANB, APSB, and ANC if the investigation has required more than 90 days for completion and the payment of retroactive aid is necessary, the payment of such retroactive aid represents the initial payment. Such payment will not be made in the month or months for which the retroactive aid is granted. In such cases, the retroactive payments shall be made in the month of board of supervisors' action granting the application if possible, and otherwise not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. (See Secs. 611-50, Beginning Date of Aid--New Applications; 611-55, Beginning Date of Aid--Restorations; and 627-30, Federal Participation.)

Example A: An ANB, APSB, or ANC application is signed on August 5, is approved by the board of supervisors the following January 10 with aid to begin on Novemberl. November, December, and January payments shall be made in January. (Had the board of supervisors action occurred so late in January that it was not possible to make the payments in January, the payments for November, December, and January would be made in February.)

(a)

(a) To take full advantage of FSSA rulings.

(Section Continued on Next Page)

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In ANB or APSB if the investigation of a request for restoration in the same county is not completed and action taken during the month immediately following the date for restoration and the payment of retroactive aid is necessary, the payment of such retroactive aid represents the initial payment. (See Secs. 215-00, Restoration of Aid, and 230-95, Investigation of Request for Restoration after Discontinuance.)

The amount of the grant for each month for which retroactive aid is paid shall be the amount to which the applicant (child or children in ANC) is eligible. (See Secs. 201-25, When Application to be Taken, and 250-00, Disposal of Applications.)

Example B: The 60-day period expired September 27, but determination of eligibility for OAS by board of supervisors' action is not until November 3. Aid is granted effective October 1. The applicant has a regular income of \$25 a month from a Veteran's Pension and \$4 a month value of occupancy making a total income of \$29 a month. This recipient has requested that his needs be determined on a budgetary basis and Total needs are found to have been \$67 in October was \$77 but increased to \$77 \$87 on November 1. On November 3, therefore, aid is granted effective October 1, and the Certificate of Eligibility shows a total need of \$67 \$77, income \$29. Grant of aid \$38 \$48. Also, on November 3 the board of supervisors acts on a Notice of Change increasing aid to \$48 \$58 effective November 1. (Total need \$77 \$87 less income \$29 equals \$48 \$58). The October grant of \$38 and the November grant of \$48 are both delivered in November.

Example C: An application for ANB is signed July 8. The 90-day period terminated October 6, but the application is not granted by the board of supervisors until November 8. Aid is granted from October 1, the first of the month in which the end of the 90-day period occurred. In October, the applicant received \$15 net rental income but no subsequent rental was received due to vacancy. As the applicant did not have excess need for October, \$60 any need in excess of \$85 in October, \$70 is granted for that month and this amount is reported on the Certificate of Eligibility. A Notice of Change increasing the grant to \$75 \$85 effective November 1 is also acted upon by the board of supervisors on November 8. The warrants for October and November are delivered in November.

Example D: The 90-day period terminated October 13, but the application for ANC is not granted until November 8. Aid is granted from October 1, the first day of the month in which the end of the 90-day period occurred. In October, the family unit had income from the mother's earnings in the amount of \$40, which left a budgetary deficiency of \$60. This employment was for October, only, and the amount needed to meet the budgetary deficiency subsequent to October was \$100. Aid for October was granted in the amount of \$60, and is so reported on the Certificate of Eligibility. On the same date that the board of supervisors granted aid in the amount of \$60, effective October 1, a Notice of Change increasing aid effective November 1, is acted upon. The November warrant for \$100; together with the October warrant of \$60, is delivered in November. (W&IC 1550, 1560, 2140, 2183, 2183,9, 3075, 3082, 3460)

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⁽a) To bring examples into conformity with statutory maximum or for clarification.

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626-60 IDENTIFICATION AID PAY ROLLS (Rev.) OAS, ANB, APSB, ANC

The following information shall be included on each aid pay roll (Forms AB 801, APSB 801, CA 801, BHI): county filing claim; month and year for which claim is filed; warrant numbers and dates; (except on county hospital claims); state case numbers; and apportionment of grants. (See Sec. 627-20, Apportionment of Grants on Payrolls or Claims)

In OAS, ANB, and APSB, the recipient's name shall be shown exactly as it appears in the signature on his Application (Forms Ag, Bl 200) and on the warrant except in OAS and ANB if the given initials only are available, they may be shown on the aid pay rolls. If a guardian of the estate or of the person and estate has been legally appointed, both the name of the guardian and the recipient shall be shown on the aid pay roll (Forms Ag; Bl AB 801 and APSB 801)

In ANC, the name of the payee shall be shown exactly as it appears on the application (Form CA 200) or latest Notice of Change (Form CA 232) and the warrant, with the family and given names of all the children for whom aid has been granted. The total numbers of children in each family budget unit eligible and ineligible for federal participation shall also be shown on the aid pay roll (Form CA 801). (See Secs. 610-50, Identification on Warrants, 202-20, The Application Form and 629-99, County Aid Claim Forms.) (W&IC 1556, 1556.5, 2140, 2189, 3087.3, 3482)

(a) To delete ref. to CIS Claim.

⁽b) To enable counties to use given initials as shown on State Controller Basic lists.

627-30 FEDERAL PARTICIS ON (Rev.) OAS, ANB, ANC

(Portions of this section not relative to the change are omitted from this agenda.)

When Federal Participation is Available OAS, ANB, ANC

The first payments made on new applications and restorations are initial payments. Federal participation is available in initial payments provided the board of supervisors' action occurs within the month for which the aid is granted and the warrant is delivered during the same month or not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. Federal participation is also available in initial payments as follows:

- 1. If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, plus the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.
- 2. If an application for aid has been improperly denied and such action is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action was taken (and-the-payment-was-delivered) and the two preceding months (see Sec. 201-25, When Application to be Taken), provided such period does not antedate the month in which payment was improperly denied or withheld.
- 3. If the beginning date of aid originally established on an application is not in accordance with the legal provisions of the W&IC and a subsequent corrective action is taken beginning aid at an earlier date. The Federal Government participates providing the retroactive aid is not for a month(s) prior to the month of the original action and further providing that the corrective action is taken and-the-warrant-is-delivered by the end of the second month following that in which the original action was taken.
- Example G: An OAS application which was signed on July 15 was approved by the board of supervisors on September 15, aid to start effective October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of W&IC 2183. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is federal participation in the warrant issued in November for September as there would have been no retroactive initial payment if the original action in September had been correct,

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Example H: An OAS application which was signed on June 15 was approved by the board of supervisors on October 15, aid to begin October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of W&IC 2183. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is no federal participation in the aid paid in November for September as the original board of supervisors' action occurred in October. Had aid been correctly approved from September 1 in October, there would have been no federal participation as the initial payment would have been retroactive.

Federal participation is available for retroactive aid in the following situations (see Sec. 361-25, Retroactive Aid Payments by County).

4. Increased Payment

If a payment of aid has been made in accordance with the authorized award and is later found to be less than the amount for which the recipient (or child or children in ANC) was eligible. The Federal Government participates in additional payments authorized and-delivered before the end of the second month following that in which the underpayments occurred.

(a)

5. Correction of Erroneous Payment

- a. If a payment in a particular month is made for less than the authorized award for that month and the error is corrected by delivery of an additional warrant within a three-month period, including the month in which the erroneous payment was made.

 No action of the board of supervisors is necessary.
- Example I: The authorized award for January is \$40. Through error only \$30 is paid on January 1. The additional \$10 may be paid later in January, in February, or not later than March 31. No change in the award is made to correct the underpayment,
- b. If a payment is made in excess of the authorized award. The Federal Government participates in the excess payment only if the amount of the excess is taken into consideration in the payment for either of the two months following the month in which the overpayment was made. No change in the authorized award should be made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the authorized award for each month.
- Example J: The authorized award in OAS is \$50. Through error \$60 is paid in January. In February or March \$10 less than the authorized award is paid to adjust for the \$10 overpayment in January. No change in the award is made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the maximum basis of \$100 for the two months.

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6. Delayed Payment

If a grant of aid has been properly authorized but either the issuance or release of the warrant has been delayed in such situations as are described in:

- a. Item 4 and 6 of Sec. 361-25, for initial warrants.
- b. Items 3 through 8 of Sec. 361-25, for other warrants.

The Federal Government participates provided the payment is released within the two months following the month for which delivery was not made.

7. Payment with Respect to an Erroneous Discontinuance

If an erroneous discontinuance is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action is taken (and-the-payment-is-delivered) and the two preceding months.

(a)

8. Appeals to SSWB

When a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, in addition to the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.

⁽a) To take full advantage of FSA rulings.

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OAS, ANB, ANC

Federal participation may be claimed by the county to meet costs incurred by other county agencies in furnishing goods, facilities, or services to the welfare department provided:

- 1. Such costs are permissible under county ordinances. In all cases the responsibility for the determination of the legality of such claim in respect to county ordinances rests with each individual county, and such determination shall be made prior to claiming federal participation.
- 2. Such costs are incurred to meet the administrative needs of the welfare department and are not costs attributable to the general expense of county government in carrying out the over-all coordinating fiscal and administrative functions of the county government.
- 3. Such costs are extra-identifiable and readily ascertainable either
 - a. by segregation, or
 - b. as a pro rata share of the costs of such goods, facilities, or services.

Definition of terms

"Goods" means articles or commodities such as furniture, equipment, printed forms, and office supplies., wares, er-merehandise.

"Facilities" means transportation and communications, such as automobile and meter delivery facilities, and telephone and telegraph. These facilities that may be used in connection with office space, such as heat, light, power, insurance, clevator service, janitor service, -cleaning, naint ing, decorating, and maintenance repairs are excluded from this definition and are covered by a separate pelicy. The printing, writing, and mailing of public assistance warrants, or any combination of such operations, including both services and goods, may be classified as a facility.

"Facilities" means transportation and communications such as charges for cost of use of automotive equipment and telephone and telegraph. "Facilities" also includes charges for the cost of use of office furniture and machinery. If office furniture and machinery is purchased from the welfare department appropriations and is used by another county agency exclusively for welfare programs the purchase cost may be claimed.

"Services" relates to personal services performed by officials or employees of other county departments. including-cests-of-travel-and-supplies necessary-and-directly-related-to-the-performance-of-the-personal-service rendered. (FSS-Admin.)

(a) To conform to Federal policy.

Federal participation may be claimed for the costs of goods, facilities, or services (as defined in Sec. 645-21) regularly provided by the county auditor to the welfare department either on an "actual cost" or "unit cost" basis. Costs may include expenditures such as salaries and wages, warrants, postage, envelopes, and the cost of use of office equipment.

If cost of such goods, facilities, or services are not readily ascertainable by segregation, a unit cost may be used.

UNIT COST BASIS

- 1. Salaries and Wages. The time recording procedure outline in Sec. 645-76, Time Recording by Employees, shall be followed for segregating salaries and wages. The resulting number of man hours spent on each aid during the study month multiplied by the average hourly salary shall be used in establishing the total salary cost by aid.
- 2. Warrants. The cost per warrant determined by the last purchase preceding the study month multiplied by the number of warrants used for each aid during the study month shall represent the total warrant cost.
- 3. Postage. The actual cost of postage used in mailing the warrants during the study month shall be determined for each aid.
- 4. Envelopes. The cost per envelope determined by the last purchase preceding the study month multiplied by the number of envelopes used during the study month for each aid shall represent the total envelope cost.
- 5. Other Goods and Facilities.

The unit cost which shall be used from the study month until the end of that fiscal year is determined by adding the total cost by program as determined under 1, 2, 3, h, and 5, above, and dividing by the number of recipients of aid (ANC-number of cases) as shown on each assistance affidavit for the month.

Each month thereafter the number of recipients of aid (ANC-number of cases) as reflected on that month's assistance affidavit multiplied by the unit cost for that aid shall determine the sum to be charged to OAS, ANB, ANC, etc., on the administrative expenses maintenance and operation worksheet.

If a unit cost is used, the county shall at least once but not more than twice each fiscal year conduct a study to establish a new unit cost or verify existing costs. Approval of the study month desired shall be secured in advance from the SDSW.

ACTUAL COST BASIS

If the costs of such goods, facilities, or services are readily ascertainable by segregation, actual cost may be claimed.

⁽a) To conform to Federal policy.

EXPENDITURES FOR PURCHASE OR REPLACEMENT OF EQUIPMENT

If either actual costs are claimed, no deviation from the regular procedures is necessary for capital expenditures. If a or unit costs is used are claimed and an expenditure is made for office furniture or equipment to be used solely for public assistance, the expenditure monthly cost of use of such items may be added to the total amount determined. en-a-unit-cest-basis.

(a)

(a)

The amount to be allocated to each program may be determined by prorating the expenditure on the ratios of the salaries and wages expenditures for each program for that month.

If new equipment is purchased by other than the county welfare department, whether on an initial purchase or replacement basis, the SDSW is to be notified in advance of the county's intention to claim so that determination can be made as to whether the items are eligible for federal participation. Such items may be claimed only on a cost of use basis, excepting that purchase cost may be claimed provided the purchase is made from the welfare appropriation and the item is used exclusively by the county auditor for welfare department programs.

Costs shall be reported currently and shall be identified as an expense of the county auditor when itemized on the Administrative Expense Worksheet (Form DFA 64A) submitted to the SDSW with the Administrative Expense Affidavit (Form ABC 807 Ag, Bl, CA 807). The county shall maintain records to substantiate these costs. (FSS-Admin.)

⁽a) To conform to Federal policy.

Reporting of public-assistance administrative expenditures shall be effected by the cash flow method; that is, upon the basis of bills paid during the month irrespective of the month to which the particular expenditure is applicable. Reporting of expenditures based upon budget encumbrance or obligations incurred does not comply with the requirements in claiming reimbursement in-the-public-assistance-programs, inasmuch as these systems do not show actual expenditures.

Items of administrative expense shall be reported on the claim for the peried month in which disbursement is made and allocated to the month of accrual in accordance with the provisions of Sec. 646-80. Beginning-with expenditures-incurred-after-June-30,-1948,-elaims-fer-items An item erroneously omitted from any monthly claim shall-net will be allowed unless provided it is claimed within-twelve-menths-from-the-date-of not later than during the quarter following the twelfth month after disbursement. Items-erreneously emitted-frem-elaims-fer-menths-prier-te-July-1;-1948;-will-be-allewed-enly-if ineluded-in-claims-to-the-SDSW-no-later-than-the-claim-for-the-menth-of-June 1949 -- Allowance of such retreactive claims shall be made by the SDSW subject te-federal-review -- (FSS-Admin -) Items of expenditure of a nature not previously claimed by a county may be claimed retroactively only from the beginning of the quarter in which such expenditure was initially claimed, or if prior approval by the SDSW is required, only from the beginning of the quarter in which the required plan is submitted in writing to the SDSW. Such plan to be effective for a given quarter shall be submitted not later than 45 days prior to the end of the quarter. Retroactive claims will be allowed by the SDSW subject to approval by the Federal Social Security Administration.

County welfare departments in claiming shall allocate administrative expense to months for OAS, ANB, ANC, CWS, BHA, BHC and AD and any other programs that may be administered by them as follows:

- 1. For salaries and wages on the basis of the month in which the services were rendered.
- 2. For maintenance and operation; expenditures readily identifiable with a specific month shall be allocated to that month; expenditures not readily identifiable with a specific month shall be allocated to the month in which payment is made. In some counties supplies are secured from a Purchasing Agent or through a Stores Department. In such instances the expenditure shall be allocated to the month of billing unless a particular accrual month is indicated.
- 3. For capital outlays, excepting repairs and alterations and purchase of buildings, the expenditures shall be allocated to the month in which the item is paid by county warrant, excepting as modified for the period March 1, 1950, through June 30, 1950, by Department Bulletin No. 392 (Fiscal) Plan for Loan of Equipment.
- 4. For repairs and alterations and purchase of buildings (prior SDSW approval required), the cost shall be amortized over a period of months agreed upon with the SDSW.

(Section Continued on Next Page)

(a)

(b)

⁽a) To conform with FSSA ruling.

⁽b) Incorporation of Dept. Bulletin 341 and 341A.

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5. Charges for services of other agencies may be included on the welfare claim if reimbursement has not been requested from another state department. Such charges shall be allocated to the month which received the benefit of the expenditure. Other county agencies need not officially bill the welfare department for claim purposes. However, data shall be kept on file in the county in sufficient detail to amply support such charges together with the individual computations covering each monthly claim. (FSS_Admin.)

(b)

⁽b) Incorporation of Dept. Bulletin 341 and 341A.

700-00 ASSIGNMENT OF : 'E NUMBERS' (Rev.) OAS

The county shall assign a state numbers to each OAS applications-granted by-the-beard-of-supervisors at the time it is taken.

1. Cases never before on OAS in county

List names in alphabetical order and assign numbers in sequence beginning with the number following the number assigned to the last case granted by the previous board action.

2. Cases previously on OAS in county

Reassign the former state number. Exception: Spouses who formerly received OAS under one number in the county.

- a. If both spouses return to OAS, reassign the former number to the husband and assign a new number to the wife.
- b. If one spouse returns to OAS, assign a new number unless the other spouse is deceased; in the latter instance reassign the former number.

Whenever the term "State Number" is used, it refers to the combination of county prefix, numerical designation, and categorical suffix; e.g., Ala 10101 Ag.

The OAS number series shall be independent of the ANB-APSB series. (W&IC 2140)

⁽a) To incorporate Dept. Bulletin re State Numbers.

The county shall assign a state numbers to each ANB or APSB applications granted by the beard-of-supervisors at the time it is taken. There shall be no distinction in numbering between ANB and APSB cases.

(a)

1. Cases never before on ANB or APSB in county

List names in alphabetical order and assign numbers in sequence beginning with the number following the number assigned to the last case granted by the previous board action.

2. Cases previously on ANB or APSB in county

Reassign the former state number. Exception: Spouses who formerly received ANB and/or APSB under one number in the county.

- a. If both spouses return to ANB and/or APSB, reassign the former number to the husband and assign a new number to the wife.
- b. If one spouse returns to ANB or APSB, assign a new number unless the other spouse is deceased; in the latter instance reassign the former number.

Whenever the term "State Number" is used, it refers to the combination of county prefix, numerical designation, and categorical suffix; e.g., Ala 10101 Bl.

The ANB-APSB number series shall be independent of the OAS series, (W&IC 3075, 3460)

FILED
In the Office of the Secretary of State
of the State of California

FRANK M. JORDAN, Secretary of State

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⁽a) To incorporate Dept. Bulletin re State numbers.

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STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 January 30, 1950

FILED

in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO. 399 (FISCAL)

TO: COUNTY WELFARE DEPARTMENTS

COUNTY AUDITORS

COUNTY BOARDS OF SUPERVISORS

DISTRICT OFFICES SDSW

1 1950 FFB

Subject: Financial Procedures with Respect to OAS, ANB, and APSB Effective Immediately and Operative March 1, 1950

This bulletin specifies the sections of the State Department of Social Welfare Manual of Policies and Procedures and the Department Bulletins which shall govern financial procedures with respect to Old Age Security, Aid to Needy Blind, and Aid to Partially Self-supporting Blind Residents, effective immediately and operative on March 1, 1950. This bulletin does not apply to programs other than Old Age Security, Aid to Needy Blind, and Aid to Partially Self-supporting Blind Residents.

MANUAL OF POLICIES AND PROCEDURES

PROVISIONS OF W&IC REGARDING FINANCIAL PROCEDURES - Section 600-00

Section 600-00 is re-adopted.

ESTIMATES, ADVANCES, AND EXPENDITURES - Sections 601-00 through 601-99

The following sections are re-adopted:

601-00	601-42	601-48
601-10	601-43	601-49
601-20	601-44	601-50
601-30	601-45	601-60
601-40	601-46	601-99
607-117	607-17	

These sections are modified with respect to estimates and advances, for the months of March, April, May, and June 1950 only, by Department Bulletin No. 393, Estimates and Advances, issued January 17, 1950.

PAYMENT OF AID - Sections 610-10 through 612-99

Sections 610-60 and 610-70 were revised by action of the Social Welfare Board on December 29, 1949. Sections 610-20 and 611-70 were revised and Section 611-40 deleted by action of the Social Welfare Board on January 26, 1950.

The following sections were re-adopted:

610-10	610-80	61.1-60
610-20 (revised)	610-90	611-70 (revised)
610-30	611-00	611-80
610-40	611-20	611-90
610-50	611-30	611-95
610-60 (revised)	611-50	612-00
610-70 (revised)	611-55	61.2-99
610-75		

COUNTY AID CLAIMS - Sections 626-00 through 629-99

Sections 626-60 and 627-30 were revised by action of the Social Welfare Board on January 26, 1950. Section 627-25 and all other references in the Financial Chapter of the Manual to institutional subvention are temporarily suspended effective March 1, 1950, pending an Attorney General's opinion as to their application on and after March 1, 1950.

The following sections are re-adopted:

626-00*	626-50	627-25	628-10
626-10*	626-60 (revised)	627-30 (revised)	628-15
626-20*	627-00*	627-40	628-20
626-30	627-10*	627-1,5	629-99*
626-110	627-15*	628-05	
626-45	627-20*	628-06	

The sections marked with an "*" are temporarily revised for the claims for the months of March, April, May, and June 1950 only, as follows; these revisions shall cease to be effective for claims for the month of July 1950 and thereafter;

Section 626-00. Delete the phrase beginning on the 4th line "except ANB and APSB which are combined as one claim." ANB and APSB claims shall not be combined.

Section 626-10. Under Item 1, second line, delete "APSB (combined as one claim)", and insert as a third item in this group "APSB" in addition to the other three programs.

Section 626-20. Under paragraph 1 insert "APSB" between the abbreviations "Bl and CA" on line 1. Under paragraph 2, first line change the forms to AB, APSB, CA 801. Under paragraph 3, add the following sentence: "Recapitulation sheets are not required for OAS, ANB, and APSB claims."

Section 627-00. OAS, ANB, and APSB claims require only two classifications as follows:

COUNTY AID CLAIMS (Continued)

OAS - ANB

- 1. The term "regular" is applied to those cases in which Federal eligibility requirements have been met. The Federal and State Governments share in the payments for these cases.
- 2. The term "non-Federal" is applied to those cases in which the Federal eligibility requirements have not been met. The State Government absorbs the full payment for such cases.

APSB

- 1. The term "regular" is applied to those cases in which county residence has been acquired. The State and County governments share in payments for these cases.
- 2. The term "non-County" is applied to those cases in which the required period of county residence has not been acquired. The state government absorbs the full payment in such cases.

Section 627-10. For OAS, ANB and APSB the following chart of financial participation in grants of aid applies.

CATE- GORY OF	TYPES OF PARTICIPATION	MAXIMUM MONTHLY	RATIO OF PARTICIPATION		
AID	A TT	GRANT	Federal Share	State Share	County Share
OAS	REGULAR	\$75	1/2 THE GRANT (NOT COUNTING EXCESS OVER \$50) PLUS \$5	ENTIRE BALANCE AFTER DEDUCTING FEDERAL SHARE	NONE
	NON-FEDERAL	\$75	NONE	ENTIRE GRANT	NONE
ANB	REGULAR	\$85	1/2 THE GRANT (NOT COUNTING EXCESS OVER \$50) PLUS \$5.	ENTIRE BALANCE AFTER DEDUCTING FEDERAL SHARE	NONE
	NON-FEDERAL	\$85	NONE	ENTIRE GRANT	NONE
APSB	REGULAR	\$85	NONE	FIVE-SIXTHS	ONE-SIXTH
	NON-COUNTY	\$85	NONE	ENTIRE GRANT	NONE

Section 627-15. This section shall not apply to OAS, ANB, or APSB.

Section 627-20. For OAS, ANB, and APSB the following designations apply:

OAS - ANB

- 1. Regular cases which require no designation on the payroll. The total grant and the amount in excess of \$50.00 shall be shown.
- 2. Non-Federal cases which are designated by two asterisks or the term "non-Federal". The total grant shall be shown.

COUNTY AID CLAIMS (Continued)

APSB

- 1. Regular cases which require no designation. The total grant shall be shown.
- 2. Non-county cases which are designated by reporting the amount of the grant in both the total column and the column for non-county cases.

Section 629-99. Forms Ag, Bl, APSB 800 and AB, APSB 801 are to be used as follows:

Affidavits to accompany monthly payrolls - OAS, ANB, APSB

Forms Ag, Bl 800 revised March 1, 1950 Form APSB 800 January 1949

Payrolls to accompany the affidavits - OAS, ANB, APSB

Form AB 801 revised January 1949 Form APSB 801 December 1948

Forms Ag, Bl 802, Recapitulation Sheets to accompany payrolls are not required for the period March 1, 1950, through June 30, 1950.

ADMINISTRATIVE EXPENSE - Sections 645-00 through 646-99

Sections 645-21, 645-27, and 645-96 were revised by the Social Welfare Board on January 26, 1950.

The following sections are re-adopted:

645-00	645-23	645-35	645-61
645-02	645-24	645-37	645-66
645-06	645-27 (revised)	645-39	645-71
645-16	645-28	645-45	645-76
645-17	645-29	645-50	645-81
645-21 (revised)	645-31	645-51	645-96 (revised)
645-22	645-32	645-55	6146-80
			646-99

REPAYMENTS - Sections 670-00 through 674-99

The following sections are re-adopted:

670-00	671-10	672-25	674-00
670-75	671-20	672-50	674-05
670-80	67125	673-00	674-10
670-85	671-30	673-25	674-99
670-88	671-50	673-50	
670-90	672-00	673-75	

DEPARTMENT BULLETINS

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The following department bulletins issued under the authority of Article XXV of the State Constitution cease to be effective on March 1, 1950:

Number	Subject
335	Submission of Estimates for Old Age Security and Security to the Blind in Counties Operating Under the Agreement Plan
335A	Submission of Estimates for Old Age Security and Security for the Blind in Counties Operating Under the Agreement Plan
33 <i>5</i> B	Submission of Revised Estimate Forms for Old Age Security and Security for the Blind by Counties Operating Under the Agreement Plan
336	Method of Reporting Aged and Blind Security Payments Under Article XXV of the State Constitution in Counties Operating Under the Agreement Plan
341	Constitutional Amendment - Aged and Blind Security Programs
341A	Reporting of Administrative Costs
343	Administrative Expense Affidavits: Aged, Blind and Children Programs
352	Method of Reporting Old Age Security and Security for the Blind Payments for January 1949 and Subsequent Months
361	Rental Claims for County-owned Buildings-Old Age Security and Security for the Blind
363	Claims for Rental Charges for Automobiles and Other Equipment

Department Bulletin No. 371, Old Age Security and Security for the Blind Warrants, issued July 13, 1949, is readopted effective immediately and operative March 1, 1950.

Title 22, Ch. ?

MAIN OFFICE SACRAMENTO 616 K STREET

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

STATE OF CALIFORNIA

Department of Social Welfare

MYRTLE WILLIAMS DIRECTOR

Sacramento 1/1 February 2, 1950 ADDRESS REPLY TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the following regulations which are being filed in accordance with Section 11380 of the Government Code.

> DEPARTMENT BULLETIN NO. 388-C (OAS, ANB) January 31, 1950 DEPARTMENT BULLETIN NO. 402 (OAS, ANB) January 31, 1950

These regulations were issued on the above date by the State Department of Social Welfare.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found FILE Phecessary for the immediate preservation of the public peace, in the Office of the Secretary of State and safety or general welfare and that notice and public of the State of California procedure thereon are impracticable, unnecessary or contrary to the public interest.

FRANK M.JORDAN, Secretary of State/

Attachments

Very sincerely yours,

MYRTLE WILLIAMS, Director

Department of Social Welfare

Certified as a Regulation (er Regulations of the

Social Welfare
(Name of State Agency)
enall Willram
(Signature)
Director
(Title)
2/2/50
(Date)

MYRTLE WILLIAMS PTRECTOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE FILED

616 K STREET SACRAMENTO 14 January 31, 1950 in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO. 388-C (OAS, ANB)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS DISTRICT OFFICES SDSW

Subject: Certification of OAS and ANB for March 1950 (Rescinding Erroneous Discontinuances)

Bulletin 402 dated January 31, 1950, and effective March 1, 1950, sets forth personal property eligibility provisions as adopted by the Social Welfare Board under the authority of Attorney General's Opinion 50/1, Aid shall not be discontinued effective February 28, 1950, for persons whose personal property holdings are within the \$1500 limitation.

It is recognized that authorization for discontinuance of aid effective February 28, 1950, has already been forwarded to counties for some individuals whose personal property holdings were found to be excessive under Bulletins 389 and 390 but who are eligible under the provisions of Bulletin 402. Such cases are to be reviewed immediately. If personal property holdings are within the \$1500 limitation, and the persons are eligible on other points, appropriate supplemental certification for payment for March 1950 must be forwarded to the county immediately.

Because of the various administrative patterns in existence there will be some variation in the manner in which the county shall be notified to restore aid to persons for whom erroneous discontinuance effective February 28, 1950, has already been sent to the county. The detail for each type of administrative setup is as follows:

1. State Administration and State Disbursement

Prepare a new Ag, Bl 278 for eligible recipients for whom a discontinuance document effective February 28, 1950, has already been sent to the county. The new Ag, Bl 278 rescinding the erroneous discontinuance and showing payment data for March in Column 6 shall be prepared in triplicate. In the available blank space in Column 7 show "Erroneous discontinuance effective February 28, 1950, rescinded." No entry is made in Columns 1 through 5. File the second copy in the case record. The original copy of the Ag, Bl 278 shall be transmitted to the Regional Office where it will be attached to the document file (the Region sends no copy to the State Controller).

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of the State of California in the Office of the Secretary of State

FEB 6 1950

FRANK M. JORDAN, Secretary of Stair

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The local office of the SDSW shall transmit the third copy of the Ag, Bl 278 rescinding the erroneous discontinuances to the county with a supplemental certification.

The supplemental certification (carrying identification of the attached documents) signed by the Social Work Supervisor shall be prepared in quadruplicate. (See Bulletin No. 388, page 5, item 3 for form of certification.) The original with the attached documents shall be transmitted to the county board of supervisors, attention county welfare director. One copy of the supplemental certification is to be retained in the local office, one copy forwarded to the Regional Office, and one copy forwarded to the SDSW, 616 Kay Street, Sacramento, Attention Bureau of Claims Accounting.

2. County Administration and State Disbursement

Prepare a new Ag, Bl 278 for eligible recipients for whom a discontinuance document effective February 28, 1950, has already been sent to the county. The new Ag, Bl 278 rescinding the erroneous discontinuance and showing payment data for March in Column 6 shall be prepared in triplicate. In the available blank space in Column 7 show "Erroneous discontinuance effective February 28, 1950, rescinded." No entry is made in Columns 1 through 5. File the second copy in the case record. The original copy of the Ag, Bl 278 shall be transmitted to the Regional Office where it will be attached to the document file (the Region sends no copy to the State Controller).

The local office of the SDSW shall transmit the third copy of the Ag, Bl 278 rescinding the erroneous discontinuance to the county with a supplemental certification.

The supplemental certification (carrying identification of the attached documents) signed by the deputy director, SDSW shall be prepared in quadruplicate. (See Bulletin No. 388, page 5, item 3 for form of certification.) The original with the attached documents shall be transmitted to the county board of supervisors, attention county welfare director. One copy of the supplemental certification is to be retained in the local office, one copy forwarded to the Regional Office, and one copy forwarded to the SDSW, 616 Kay Street, Sacramento, Attention Bureau of Claims Accounting.

3. County Administration and County Disbursement (Monterey, San Benito, San Francisco, Santa Clara, and Santa Cruz)

If persons are now determined to be eligible for payment for March 1950, but a discontinuance Form Ag, Bl 232 effective February 28, 1950 has already been certified and forwarded to the county, prepare a new Ag, Bl 232, in triplicate, rescinding the erroneous discontinuance and showing payment data for March 1950. Under Remarks record "Erroneous Discontinuance effective February 28, 1950, rescinded". File a duplicate copy of the Ag, Bl 232 in the case record, and forward a copy to the SDSW, 616 Kay Street, Sacramento.

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The original py of the Ag, Bl 232 rescindin to erroneous discontinuance shall be transmitted to the county with applemental certification (see Bulletin No. 388, page p, item 3 for form of certification.)

The supplemental certification (carrying identification of the attached documents) signed by the deputy director SDSW shall be prepared in triplicate (see Bulletin No. 388, page 5, item 3 for form of certification).

The original with the attached documents shall be transmitted to the county board of supervisors, attention county welfare director. One copy of the supplemental certification is to be retained in the local office, and one copy is to be forwarded to the SDSW, 616 Kay Street, Sacramento, attention Bureau of Claims Accounting.

4. State Administration and County Disbursement (Alameda and Los Angeles)

1

If persons are now determined to be eligible for payment for March 1950 but a discontinuance document effective February 28, 1950, has already been sent to the county, prepare a new document rescinding the erroneous discontinuance as follows:

Alameda: Prepare a new Ag, Bl 278 in triplicate rescinding the erroneous discontinuance and showing payment data for March in Column 6. In the available blank space in Column 7 show "Erroneous discontinuance effective February 28, 1950 rescinded". No entry is made in Columns 1 through 5. File the second copy in the case record. The original copy of the Ag, Bl 278 shall be transmitted to the Regional Office where it will be attached to the document file. The third copy of the Ag, Bl 278 rescinding the erroneous discontinuance shall be forwarded to the county with a supplemental certification.

Los Angeles: Prepare Ag, Bl 232, in triplicate, rescinding the erroneous discontinuance and showing payment data for March 1950. Under Remarks record "Erroneous discontinuance effective February 28, 1950, rescinded". File a duplicate copy of the Ag, Bl 232 in the case record, and forward a copy to the State Department of Social Welfare, 616 Kay Street, Sacramente.

The original copy of the Ag, Bl 232 rescinding the erroneous discontinuance shall be transmitted to the county with a supplemental certification.

The supplemental certification (carrying identification of the attached documents) signed by the case work supervisor shall be prepared in quadruplicate (see Bulletin No. 388, page 5, item 3 for form of certification).

The original with the attached documents shall be transmitted to the county board of supervisors, attention county welfare director. One copy of the supplemental certification is to be retained in the local office, one copy is to be forwarded to the Regional Office, and one copy to the State Department of Social Welfare, 616 Kay Street, Sacramente, attention Bureau of Claims Accounting.

* * * * * *

Notification to Recipients - Any recipient whose aid was erroneously discontinued effective February 28, 1950, because of personal property holdings must be notified immediately that the discontinuance action has been cancelled and that aid will continue. It is recommended that an individual letter be written to each such recipient in lieu of use of the notification form.

Department Bulletin No. 388-C

Page 3

Certified as a Regulation (or Regulations of the

Social Welfare
(Name of State Agency)
(Signature)
(Signature)
Director
(Title)
2/2/50
(Date)

Wx982140 3078 MYRTLE WILLIAMS STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE FILED 616 K STREET in the Office of the Secretary of State SACRAMENTO 14 of the State of California January 31, 1950 DEPARTMENT BULLETIN NO. 402 (OAS, ANB) FEB 6 1950 TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS

COUNTY AUDITORS DISTRICT OFFICES SDSW

FRANK MORDAN, Secretary of State

Subject:

OAS and ANB Real/and Personal Property

Eligibility Effective March 1, 1950

This bulletin replaces the personal and real property provisions of Bulletin No. 389 (Sections II and III), and Section VI of Bulletin No. 390. It replaces Bulletin No. 395 adopted by the Social Welfare Board on January 13, 1950, and rescinded before it was released. Also, this bulletin supersedes any provisions of the personal and real property chapters of the Manual of Policies and Procedures which are in conflict with it.

WHEREAS, the Old Age Security and Aid to Needy Blind Laws in California permit the retention of certain real property and exempt certain items from consideration as personal property, and

WHEREAS, the Social Security Administration regulations require that all property, real or personal, may be retained only for the purpose of meeting current or future identifiable needs of applicants or recipients, and

WHEREAS, the joint application of the Federal regulations and the provisions of the Welfare and Institutions Code would result in rules and regulations more stringent than those contemplated either by the State or Federal government, and

WHEREAS, these more stringent regulations would result directly from the necessity of securing conformity with Federal regulations, and

WHEREAS, Attorney General's Opinion No. 50/1 states that the State Social Welfare Board may vary classes of property, and

WHEREAS, the State Social Welfare Board believes that no undue hardship should result before the problem is considered by the legislature,

NOW, THEREFORE BE IT RESOLVED that the State Social Welfare Board finds it necessary and convenient to adopt rules and regulations to harmonize and integrate the aforesaid Federal regulations and the State Code provisions into a unified system for the complete and comprehensive control of the subject until such time as the legislature may resolve these conflicts. Therefore, effective March 1, 1950, eligibility from standpoint of real and personal property holdings shall be determined under the following regulations:

I. PERSONAL PROPERTY

A. The maximum total amount of all personal property which may be owned is \$1500 after encumbrances of record have been deducted subject to certain exceptions -herein after sp fied. The \$1500 limitation in des:

- 1. Cash and securities;
- 2. The cash surrender value of a policy or policies of insurance on the life of the applicant or recipient. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either.

Insurance which has no cash surrender value because it is the type of policy which is payable only on death of the insured constitutes a resource only to the extent of providing for burial of the insured. For purposes of Old Age Security and Aid to Needy Blind, such insurance is considered the separate property of the insured and the face value of such policy or policies of insurance, not to exceed \$500 shall be used in determining personal property holdings of the insured.

- 3. The value of any motor vehicle not used for essential personal transportation;
- 4. The value of jewelry other than personal jewelry;
- 5. The value of a burial trust or similar fund;
- 6. The current market value of all other items of personal property, except the following items if used to meet the continuing needs of individuals:
 - (a) A motor vehicle if used for essential personal transportation. The value of the motor vehicle, determined in accordance with Mamual Section 143-75, must be included when (1) the vehicle represents an investment rather than a means of personal transportation; (2) the vehicle is in storage; or (3) the vehicle is of a new and expensive type beyond the means of a person in need.
 - (b) "Personal effects" including clothing, personal jewelry, furniture, household equipment, livestock retained for family use only, foodstuffs, fuel, interment plots.
- B. The value of items of personal property shall be determined in accord with the procedures set forth in the Personal Property Chapter of the State Manual of Policies and Procedures.

II. REAL PROPERTY

Real property used as a home by the applicant or recipient meets the basic need for shelter and may be retained for that purpose without affecting eligibility for aid if the net county assessed valuation does not exceed \$3500. Real property not used as a home, even though total holdings are within the \$3500 net county assessed value, must be utilized for current or future identifiable needs of the applicant or recipient. Regulations governing the utilization of real property for current or future identifiable needs as necessary to meet Federal requirements will be issued in a later bulletin.

In Aid to Needy Blind, money received by a recipient from an involuntary conversion of real property into personal property shall be considered real property for one year from the date the proceeds are received if the proceeds are to be used for the purpose of buying a home to meet the recipient's need for housing.

In Old Age Security, money (cash or securities) received by a recipient from the forced sale of his home; i.e., under condemnation proceedings, may be retained during the one-year period subsequent to the day payment is received, if it is to be used for the purpose of buying another home, without affecting his eligibility from either the real or personal property standpoint.

MAIN OFFICE SACRAMENTO 616 K STREET

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET 12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

STATE OF CALIFORNIA

Department of Social Welfare

MYRTLE WILLIAMS
DIRECTOR
Sacramento 14
February 3, 1950

ADDRESS REPLY TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California FILED

in the Office of the Secretary of State of the State of California

FEB 8 1950

FRANK M. JORDAN, Secretary of States

By Man Sayur,

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Manual Letter No. 137.

This material was previously filed with your office on January 30, 1950. It is now being sent to you in the form of manual pages.

Very sincerely yours,

Department of Social Welfare

468:b5 Attachments Certified as a Regulation (cr Regulations of the

(Name of State Agency) .

Wurtlehe Dubeus
(Signature)

(Title)

(Date)

MANUAL UNIT

1297-1299

MYRTLE WILLIAMS

Director

SECRETARY OF STATE

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 February 3, 1950 FILED
in the Office of the Secretary of State
of the State of California

FEB 8 1950

FRANK M. ORDAN, Secretary of State

By OMB SAND

MANUAL LETTER NO. 137

The attached revisions are to be entered in your copy of the Manual of Public Assistance Policies and Procedures and the revision numbers added (if necessary) and canceled on the separators of the revised chapters. The revision numbers are as follows:

Welfare Personnel Standards Continuing Services Financial Procedures State Case Numbers Revisions 87 through 89 Revisions 230 and 231 Revisions 472 through 485 Revisions 1 and 2

These revisions were adopted by the Social Welfare Board on January 26, 1950, and are to become effective immediately (i.e., on issuance) and operative on March 1, 1950, even though the Manual pages are marked "Effective March 1, 1950".

New Sec. 073-21 specifies the rights of employees transferring from the SDSW to county welfare departments and prescribes the procedure for the layoff of county employees, when such layoff is necessary.

Secs. 074-15 and 074-30 have been revised to specify that persons employed on a provisional or emergency basis must be citizens of the U. S.

Secs. 362-40 and 362-45 as revised provide for the reporting on the Notice of Change, Form Ag, Bl 232, of all reasons for discontinuance of OAS, ANB, and APSB, rather than only the reason appearing first on the list.

Sec. 610-20 has been revised to restrict enclosures mailed with warrants to matters relating to the administration of the program to which the warrant refers.

Sec. 611-40, recommending the maintenance of a signature card file, is deleted.

Sec. 611-70, as revised, provides that retroactive initial payments shall be made in the month of board of supervisors' action granting the application, if possible, but not later in the following month than the time such payment would normally be issued under the county's customary fiscal procedure.

Sec. 626-60 has been revised to permit the use of given initials only as identification on the OAS and ANB payrolls if the recipient's full name is not available.

Sec. 627-30 has been revised to delete the requirement that in order to obtain Federal Participation in certain cases, the warrant must be delivered in the month in which board of supervisors' action is taken.

The definitions of "goods", "facilities", and "services" in Sec. 645-21 have been revised.

Sec, 645-27 has been revised with respect to the method of claiming Federal participation in expenditures for the purchase or replacement of equipment of the county auditor.

Sec. 645-96 has been revised to specify the month to which administrative expense shall be allocated.

Secs. 700-00 and 700-05, as revised, provide for the assignment by the county of state numbers to all OAS, ANB, and APSB applications regardless of whether they are granted or denied by the board of supervisors or whether they are withdrawn or canceled.

In Department Bulletin No. 394 the following correction is to be made: on page 10, under Fair Hearings, in column 4, change Sec. "325-60" to "325-65".

Department Bulletin No. 358 is now obsolete.

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073-20 (Continued)

073-20

The order of preference in certifying eligibles shall be: county reemployment list, promotional eligible list, state-wide reemployment list, county eligible list, district eligible list, state-wide eligible list.

Names which have appeared on a list for three consecutive years shall be removed from the reemployment lists unless the period is extended by the SSWB. (Walc 119.5, 119.6)

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073-10 REMOVAL OF NAMES FROM ELIGIBLE LISTS WPS

073-10

Under supervision and direction of the SSWB, the examining agency may remove the name of an eligible from an eligible list:

- 1. For any of the causes stipulated in Sec. 071-95, Disqualification of Applicants;
- 2. On evidence that the eligible cannot be located by postal authorities;
- 3. On receipt of a statement from the eligible declining an appointment and stating that he no longer desires consideration for a position with the agency;
- 4. If three offers of a probationary appointment to the class for which the eligible list was established have been declined by the eligible;
- 5. If the name has been on the eligible list for a period of one year or more, and all other names which have been on the list for the same length of time or longer are also removed.

The examining agency shall notify the eligible by mail addressed to his last-known address of this action and the reasons therefor. An eligible's name shall be reinstated on the eligible list upon showing of cause satisfactory to the SDSW, or in accordance with a decision of the SSWB upon appeal as provided in Sec. 076-70, Appeal from Dismissal, Suspension, or Demotion. (Walt 119.5, 119.6)

073-20 REEMPLOYMENT LISTS WPS

073-20

In addition to the eligible list for any class there shall be maintained for each class, county, district and state-wide reemployment lists, which shall contain names of (1) employees who had permanent or probationary status and who have been laid off or demoted from positions in the class in accordance with the procedure outlined in Sec. 076-05, Reduction of Force, and (2) persons who have resigned and who within one year from the date of resignation have, with the consent of an appointing authority and the SDSW, withdrawn their resignations, and (3) employees who have separated from a county welfare department to accept transfer to the SDSW in accordance with the provisions of Article XXV of the Constitution which assigns functions heretofore performed by the counties to the SDSW. The names of such transferred employees shall remain inactive on the reemployment list unless their employment is terminated by the SDSW because of reduction in force, or rejection during either (a) the Interim Merit System or (b) the State Civil Service probationary period, as defined by the Government Code and State Personnel Board Rules.

The names shall be placed on the county reemployment list in accordance with the combined Report of Performance and seniority score if the county has adopted the California County Merit System Report of Performance; otherwise, the names shall be placed on the county reemployment list on a seniority basis alone. The names shall be placed on the district and state-wide reemployment lists in accordance with the total seniority score alone. For example, the name of the employee laid off who had the highest score for the class would be placed at the top of the list, and the name of the person who had the lowest score would be at the bottom of the list.

The name of a person receiving an appointment as a result of a spot or area examination shall not be placed on a reemployment list except for the county from which he was separated, (Section Continued on Next Page)

REVISION 86

Revised August 26, 1949 Effective September 1, 1949 073-25 (Continued)

073-25

An employee who leaves employ of the county (except by lay-off) in which he has gained eligibility for promotion shall be considered as having relinquished his right to promotion, and his name shall be stricken from such promotional eligible list. In discretion of SDSW, such employee's name may, if the employee requests it in writing, be placed upon eligible list for same class in accordance with final rating attained in promotional examination, if there be such an eligible list then existing. (Walc 119.5, 119.6; FSS-Admin.)

073-30 INACTIVE LISTS

073-30

The name of an eligible who is not available for immediate certification shall be placed upon an inactive list, but may be restored to the active list from which it was removed upon written request of such eligible, provided list resulting from the examination in which he participated is still in existence. (See Sec. 073-70, Response by Certified Eligible and Sec. 073-90, Voluntary Withdrawal from Active List.) (WAIC 119.5, 119.6)

073-50 REQUEST FOR CERTIFICATION OF ELIGIBLES WPS

073-50

Whenever a position is to be filled, appointing authority shall notify the SDSW of that fact in advance of date of anticipated need and shall make written request for certification on Form PS-18, Request for Certification, stating duties, salary, tenure, and location of the position.

In requesting certification for personnel, the appointing authority may have the right to specify the sex of the eligible to be certified, providing that a justifiable reason is given for the request and is approved by the Personnel Officer. (Walt 119.5, 119.6)

073-60 CERTIFICATION OF NAMES WPS

073-60

Examining agency shall certify to appointing authority on Form PS-19, Certification of Eligibles, names and addresses of the three persons who stand highest on eligible list for class to which position belongs and who have indicated a willingness to accept conditions of employment as specified.

073-21 TRANSFER TO COUNTY AGENCIES

073-21

In accordance with Chapter 10, Statutes 1949, first extraordinary session, each employee of the SDSW on February 28, 1950, who was appointed to his position in the SDSW in accordance with the provisions of Section 18598 of the Government Code and subdivision (b) of Section 107 of the Welfare and Institutions Code shall be reemployed by the county by which he was employed immediately prior to such state appointment when that county resumes the functions of OAS and ANB. He shall receive the same classification, salary, rights, seniority, and status as a probationary or permanent employee that he last had in such county, except:

- (a) Time served in such state employment shall be applied toward completion of any probationary period.
- (b) Each employee shall receive the sick leave and vacation credits that he had accumulated as of the time he accepted state employment, less any sick leave or vacation taken or paid for after his separation from county service.
- (c) For the accumulation of credits for vacation, sick leave, seniority, and salary adjustment, time spent in state service shall be credited to such an employee, but in no event shall such credits exceed the credits to which the employee would be entitled if he had rendered like service to the county and in no instance shall this balance be less than zero.

The SDSW shall be notified by the appointing authority on Form PS-20 (Notice of Appointment) of each employee who has transferred from the state service to a county welfare department under the provisions of Chapter 10, Statutes 1949, 1st extraordinary session.

If, as a result of the reemployment of such persons, a layoff among the employees of a county welfare department is made necessary, such layoffs shall be made in accordance with provisions of Sec. 076-05, Reduction in Force, except that in computing seniority for layoff purposes persons who accepted state employment under the provisions of Section 18598 of the Government Code or subdivision (b) of Section 107 of the Welfare and Institutions Code shall be given credit by the county for the period during which they were so employed by the SDSW as though the time had been spent in county service.

The SDSW shall insure compliance with the provisions of this section to the end that the State of California at all times conforms to the requirements of Federal law for the continued receipt of Federal grants-in-aid for the administration of public assistance and/or child welfare services programs. (Walc 119.5, 119.6; FSS-Admin)

073-25 PROMOTIONAL ELIGIBLE LISTS

073-25

Names of competitors who are successful in promotional examinations for any given county as provided in these rules shall be placed on the county promotional eligible list for class for which such examination is held and said list may take precedence over eligible list and general reemployment list for said class at discretion of appointing authority.

074-15 PROVISIONAL APPOINTMENTS

074-15

If, in the opinion of appointing authority, there are urgent reasons for filling a position and there are no eligibles on any appropriate employment list, appointing authority may submit to SDSW on Form PS-16 (Statement of Qualifications for Provisional Appointment) the name of the person to fill the position pending examination and establishment of an eligible list. If such person's qualifications have been certified by examining agency as meeting minimum requirements as to training and experience for the position, and he is a citizen of the United States, such person may be provisionally appointed to fill existing vacancy only until an appropriate eligible list is established and appointment made therefrom. No provisional appointment shall be made until the position has been classified and minimum qualifications established therefore, in accordance with these rules. No provisional appointment shall be continued for more than ninety (90) days after an appropriate eligible list has been established for the class of position and in no event for more than six (6) months from date of appointment; except that when a provisional employee has filed a relevant examination appeal which is granted a hearing by the SSWB, his appointment may continue during the pendency of such appeal in accordance with the provisions of the rules governing provisional appointments. Successive provisional appointments of same person shall not be permitted and a position shall not be filled by repeated provisional appointments. Expiration of a provisional appointment shall be reported to SDSW on Form PS-21 (Report of Separation).

The period of provisional appointment shall not constitute a part of the probationary period except as provided in Sec. 074-50, Nature, Purpose and Duration of Probationary Period. Employees not covered by Sec. 074-10, Employees Appointed Prior to Adoption of These Rules, and all appointments made subsequent to the adoption of these rules but prior to the holding of examinations, shall be regarded as provisional employees.

For the purpose of this section and as long as recruitment difficulties persist, provisional appointments may be extended at the end of the six months period with the approval of the SDSW, and successive provisional appointments of the same individual to different positions and successive provisional appointments to the same position may be made in exceptional circumstances subject to the following conditions:

- 1. That an examination has been publicly announced or will be announced by the examining agency prior to a date not exceeding six months after the beginning date of each provisional appointment, or that if after an examination has been announced the examining agency has found that a sufficient number of applicants has not filed to assure adequate competition.
- 2. That in the absence of a definite examination date, provision shall be made to accept continuous receipt of applications for an examination for a given class as outlined in Sec. 071-80, Filing Applications, and the examination is to be held whenever the examining agency, with the concurrence of the SSWB, finds that enough applicants have filed to assure adequate competition.

074-10 EMPLOYEES APPOINTED PRIOR TO DATE OF ADOPTION OF THESE RULES

074-10

An employee who is certified by the agency as having given satisfactory service on or before December 31, 1939, may be admitted to the examination for the position held by him as of that date, without regard to minimum qualifications of training and experience. Upon certification of examining agency that he has qualified in the examination held in accordance with the provisions of Sec. 071-55 Types of Examinations, he may be appointed as a permanent employee. Permanent status of such an employee shall date from certification of examining agency that he has qualified in the examination.

An employee, certified in accordance with paragraph 1 of this section as having given satisfactory service, who has been transferred or promoted to another position subsequent to December 31, 1939, but prior to the examination for the position currently held, shall be required to submit adequate evidence to SDSW that he possesses required ability and fitness to perform duties of the position in order to be admitted to the examination for that position. Such an employee may, on certification of examining agency that he has qualified in examination for that position, be retained as a permanent employee. Permanent status of such an employee shall date one year from date of appointment to the position after certification by the examining agency that he has qualified in examination. An employee, transferred or promoted as described above, who fails to qualify in the examination for the position currently held by him may, on certification of examining agency that he has qualified in the examination for the position held by him on December 31, 1939, be retained in that position provided there is a vacancy in the class.

An employee who fails to qualify in the examination for either of the positions referred to in paragraphs 1 and 2 of this section shall be removed from his position within ninety (90) days after establishment of a list of eligibles for such position or positions. (Walc 119.5, 119.6; FSSB)

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.074-35 LIMITED TERM APPOINTMENTS

074-35

If an employee is needed for a temporary period, a certification shall be made by the examining agency of names of those eligibles, in the order of their places on an appropriate employment list, who have indicated willingness to accept limited term employment.

Certification shall be made in manner set forth in Sec. 073-60, Certification of Names. Appointments shall be made in same manner as prescribed in this rule for probationary appointments. Duration of a limited term appointment shall be limited to a period not to exceed one day less than probationary period. Acceptance or refusal of an appointment shall not affect an eligible's standing on an eligible list or his eligibility for a probationary appointment, and the period of temporary service shall not constitute a part of a probationary period. Successive limited term appointments to same position shall not be made nor shall an employee receive continued limited term appointments. Expiration of a limited term appointment shall be reported to SDSW by appointing authority on Form PS-21 (Report of Separation).

A permanent or probationary employee who has accepted a limited term appointment in a higher class shall, if he so desires, at the termination of the limited term appointment be reinstated in his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position. (WAIC 119.5, 119.6; FSS-ADMIN.)

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074-15 (Continued)

074-15

3. That, where there is an established eligible list for a given classification but there are no immediately available eligibles for appointment, the SDSW may approve the extension of a provisional appointment in accordance with the provisions outlined under (1) and (2).

A permanent or probationary employee who has accepted a provisional appointment in a higher class shall, if he so desires, at the termination of the provisional appointment be reinstated to his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position. (W&IC 119.5, 119.6; FSS-Admin)

074-30 EMERGENCY APPOINTMENTS WPS

074-30

Whenever an emergency exists which requires the immediate services of one or more persons and it is not possible to secure such persons from appropriate eligible lists, appointing authority may appoint a person or persons without regard to other provisions of these rules governing appointments, except that all persons appointed on an emergency basis must be citizens of the United States. In no case, however, shall an emergency appointment continue for a longer period than ninety (90) days in any twelve-month period unless approved by SDSW. Each emergency appointment shall, when appointment is made, be reported to SDSW by appointing authority on Form PS-20 (Notice of Appointment). When emergency appointment terminates the SDSW shall be notified by appointing authority on Form PS-21 (Report of Separation).

A permanent or probationary employee who has accepted an emergency appointment in a higher class shall, if he so desires, at the termination of the emergency appointment be reinstated to his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position. (Walt 119.5, 119.6;FSS-Admin)

362-40

- Item C8. Income from other sources--Check if aid was discontinued because of the receipt of income from some source other than those listed under Items C2-C7. Write a brief description of such income; e.g., unemployment insurance, old age and survivors insurance. If necessary, additional space may be used under Remarks.
- Item C9. Subsequent information disproves eligibility originally established—Check if aid was discontinued because subsequent information indicated that the recipient was not eligible for the original grant. Indicate under Remarks the specific grounds for ineligibility; e.g., age, property, residence, etc. Explain briefly how and when ineligibility was discovered.
- Item ClO. Change in law or policy-Check if a change in legal or administrative policy automatically makes the case ineligible at the time of change although previously it was eligible. Specify briefly the nature of the change.
- Item Cll. Refusal after acceptance to comply with established regulations—Check if aid was discontinued because the recipient refused to comply with established regulations; i.e., refusal to supply information, etc.
- Item C12. Excess property—Check if aid was discontinued because the value of the recipient's real or personal property, or both, exceeds that permitted under the OAS law, but the need for assistance is not met by the income, if any. If the income meets the recipient's needs, check Item C7.
- Item C13. In county hospital (medical care) more than two months—Check if aid was discontinued because the recipient received aid for two calendar months after admission to a county hospital for medical care. Enter the date of admission and check the appropriate sub-item indicating the determination of probable period of hospitalization from date of admission to the hospital. Completion of this item is important since Federal reimbursement is allowed for aid paid during the second calendar month of confinement only when a determination has been made that hospitalization is for a temporary period. (See Sec. 164-10, ELIGIBILITY DURING HOSPITALIZATION.)
- Item C14. Admitted to county infirmary (custodial care) -- Check if aid was discontinued because recipient entered a county infirmary for custodial care; i.e., shelter and maintenance only. Enter the date of admission.
- Item C15. Admitted to other public institution—Check if aid was discontinued because the recipient entered a public institution other than a county hospital or county infirmary. Enter the date of admission and the name of the institution.
- Item C16. Accepted for ANB or APSB--Check if aid was discontinued because the recipient was granted ANB or APSB.
- Item C17. Loss of state residence--Check if aid was discontinued because the recipient has moved out of the state and has established residence elsewhere.

362-40 DISCONTINUANCE OF AID TO THE INDIVIDUAL RECIPIENT, SECTION II, OF NOTICE OF CHANGE OAS

362-40

- Item A. Date ineligibility discovered--Enter the date on which the facts causing discontinuance of aid to the recipient came to the attention of the county.
- Item B. Date of last previous county investigation—Enter the date on which the county investigation preceding the one resulting in discontinuance of aid to the recipient was completed.
- Item C. Reason for discontinuance of aid to recipient—Check all applicable reasons for discontinuance which appear on the list. For example, if earnings of spouse (Item C3) and contributions from adult children (Item C5) result in the discontinuance of a case, check both Item C3 and Item C5.
- Item Cl. Death--Check if aid was discontinued because of the death of the recipient. Write in the date of death; e.g., 1/16/47. If death occurred in a county hospital or other public institution, enter the date of admission under Item Cl3, Cl4, or Cl5, whichever is applicable.
- Item C2. Earnings of recipient—Check if aid was discontinued because of earnings of the recipient (including earnings from self-employment).
- Item C3. Earnings of spouse--Check if aid was discontinued because of the receipt of support from earnings (including earnings from self-employment) of recipient's husband or wife whether or not the earnings were considered community property.
- Item C4. Other resources of spouse-Check if aid was discontinued because of support from separate income of the spouse; i.e., rental of spouse's separate property, or separate income from any source other than earnings of the spouse.
- Item C5. Contributions from adult children--Check if aid was discontinued because of the receipt of support from adult children.
- Item C6. Contributions from others--Check if aid was discontinued because of contributions from persons other than the spouse or adult children.
- Do not check Item C6 if the income was derived from roomers and/or boarders in the household; discontinuance under these conditions should be entered under Item C2 if the recipient is responsible for management of the household, or under Item C3 if the spouse is responsible for management of the household.
- Item C7. Income from property--Check if aid was discontinued because of receipt of income from real or personal property. Write a brief description of the nature of this income; e.g., rent from dwelling, interest on loan, etc. If necessary, additional space may be used under Remarks.

362-45 (Continued)

362-45

- Item C4. Other resources of spouse--Check if aid was discontinued because of support from separate income of the spouse; i.e., rental of spouse's separate property, or separate income from any source other than earnings of the spouse.
- Item C5. Contributions from parents or adult children--Check if aid was discontinued because of the receipt of support from parents or adult children.
- Item C6. Contributions from others--Check if aid was discontinued because of contributions from persons other than the spouse, parents or adult children.
- Do not check Item C6 if the income was derived from roomers and/or boarders in the household; discontinuance under these conditions should be entered under Item C2 if the recipient is responsible for management of the household, or under Item C3 if the spouse is responsible for management of the household.
- Item C7. Income from property-Check if aid was discontinued because of receipt of income from real or personal property. Write a brief description of the nature of this income; e.g., rent from dwelling, interest on loan, etc. If necessary, additional space may be used under Remarks.
- Item C8. Income from other sources--Check if aid was discontinued because of the receipt of income from some source other than those listed under Items C2-C7. Write a brief description of such income; e.g., unemployment insurance, old age and survivors insurance. If necessary, additional space may be used under Remarks.
- Item C9. Subsequent information disproves eligibility originally established—Check if aid was discontinued because subsequent information indicated that the recipient was not eligible for the original grant. Indicate under Remarks the specific grounds for ineligibility; e.g., age, property, residence, etc. Explain briefly how and when ineligibility was discovered.
- Item ClO. Change in law or policy-Check if a change in legal or administrative policy automatically makes the case ineligible at the time of change although previously it was eligible. Specify briefly the nature of the change.
- Item Cll. Present vision exceeds standard for blindness--Check if aid was discontinued because recipient is not blind within the prescribed degree. When conclusive evidence establishes that recipient was not originally eligible as to degree of blindness, check Item C9.
- Item Cl2. Refusal after acceptance to comply with established regulations--Check if aid was discentinued because the recipient refused to comply with established regulation; i.e., refusal to supply information, soliciting alms.

362-42 (Continued)

362-42

If an increased contribution is made to the recipient by a person in the home without new employment or increased earnings or increase in other resources, the case should be reported in Item 6.

Item 6. Other Material change in economic circumstances—Check this item for cases in which the recipient's need for assistance has decreased for reasons other than those specified in items above; i.e., cases in which need has decreased with no increase in resources, and cases in which need has been decreased because of marriage of the recipient.

If an increased contribution is made to the recipient by a person in the home without new employment or increased earnings orincrease in other resources, the case should be reported under this item.

Item 7. No known material change in economic circumstances—Check this item for cases in which there is no known change in economic circumstances of cases discontinued; i.e., any non-income reason. (Walc 2140; FSS-Admin.)

362-45 DISCONTINUANCE OF AID TO THE INDIVIDUAL RECIPIENT SECTION II, OF NOTICE OF CHANGE ANB. APSB

362-45

- Item A. Date ineligibility discovered -- Enter the date on which the facts causing discontinuance of aid to the recipient came to the attention of the county.
- Item B. Date of last previous county investigation—Enter the date on which the county investigation preceding the one resulting in discontinuance of aid to the recipient was completed.
- Item C. Reason for discontinuance of aid to recipient—Check all applicable reasons for discontinuance which appear on the list. For example, if earnings of spouse (Item C3) and contributions from parents or adult children (Item C5) result in the discontinuance of a case, check both Item C3 and Item C5.
- Item Cl. Death—Check if aid was discontinued because of the death of the recipient. Write in the date of death; e.g., 1/16/47. If death occurred in county hospital or other public institution, enter the date of admission under Item Cl4, Cl5, or Cl6, whichever is applicable.
- Item C2. Earnings of recipient—Check if aid was discontinued because of earnings of the recipient (including earnings from self-employment).
- Item C3. Earnings of spouse-Check if aid was discontinued because of the receipt of support from earnings (including earnings from self-employment) of recipient's husband or wife whether or not the earnings were considered community property.

610-20 TIME OF PAYMENT OAS, ANB, APSB, ANC

610-20

Payments of aid shall be made by county warrant monthly in advance, except payments of ANC for children who are living in boarding homes or institutions. Payment of ANC for such children may be made to the boarding home or institution either in advance or subsequent to the furnishing of care and support. One warrant may be issued to each boarding home or institution covering all children in the home to whom board and care is given during the month, or a separate warrant may be issued for each child or family group. (See Secs. 610-40, Recipient of Payment, 611-60, Initial Payments, and 361-25, Retroactive Aid Payments by County.)

Payment is effected by deposit of the warrant, properly stamped and addressed, in the United States mail, or by delivery to the recipient or payee by an authorized representative of the county. Enclosures with warrants so mailed or delivered are restricted to those matters relating to administration of the program to which the warrant refers. Any other material which a county may desire to enclose with a warrant requires prior SDSW approval.

Advance payment means delivery of the warrant on or as near as possible to the first business day of the month as compliance with state and county regulations will permit; however, the warrant should not be deposited in the mail for delivery prior to the first day of each respective month.

All warrants shall be clearly marked to show the date of issuance. If the delivery date is other than the date of issuance shown on the warrant, the date of delivery shall be shown either on the warrant or on a separate record which shall be available for inspection by the SDSW.

If a recipient is eligible on the first day of the month, he is entitled to receive payment for the full month, even though his status changes at some time during the month. (See Sec. 611-00, Payment When Grantee Dies.)

The state, federal, and county portions of the aid shall be paid at one time by a single warrant. (W&IC 1550, 1552, 1556.5, 1558, 1560, 2140, 2160.6, 2182, 2182.1, 2183.9, 3044, 3075, 3082, 3084, 3444, 3460; FSS-Admin.)

610-10 MODE OF PAYMENT OAS, ANB, APSB, ANC 18364 48 30 3M11 610-10

All aid paid to recipients shall be by warrant of the county.

County warrants issued in payment of aid shall be redeemable at par. The financial condition of the county should at all times guarantee the cashing of warrants without discount. If it becomes necessary at some time for the county to register its warrants, the SDSW shall be notified at once as to arrangements made with local banks for the immediate cashing of warrants at par on demand.

Aid in kind is not subject to state and federal participation. (W&IC 1560, 2140, 2183, 3075, 3460; Pol. Code 4082; FSS-Admin.)

610-40 RECIPIENT OF PAYMENT OAS, SB, APSB, ANC

610-40

Payments of security or aid shall be made directly to the grantee or authorized payee, except under certain conditions following death when the provisions of Secs. 611-00, Payment When Grantee Dies, and 611-10, Payments When Child Dies, shall be followed.

In OAS, SB, and APSB, when a guardian is the payee, Summary of Letters of Guardianship (Form DPA 5) shall be on file with the SDSW. In SB and APSB where the grantee is a minor and the guardian is the natural parent, letters of guardianship are not required. (See Sec. 626-60, Identification on Aid Pay Rolls.) The guardian's name shall appear on the pay roll together with the name of the grantee.

ANC payments shall be made to the person or institution providing care for the children on whose behalf the grant is made. If ANC is paid on behalf of children who are wards of the juvenile court, the payments may be made to the probation officer. If payments are made on behalf of a parolee from the California Youth Authority for whom the parole officer signed the application, the warrants shall be made payable to, and mailed to, the relative if the child is living with a relative eligible under the Social Security Act, or, if the child is living in a boarding home, the warrant shall be made payable to the boarding home mother and shall be mailed in care of the area office of the California Youth Authority. (See Sec. 628-00, Payees Eligible Under Social Security Act.) (Walc 1556.5, 1557, 1560, 2140, 2183, 3075, 3460; FSS-Admin.)

610-50 IDENTIFICATION ON WARRANTS OAS, ANB, APSB, ANC

610-50

The payee's name shall appear on the warrant and on the pay roll exactly as his signature appears on the application (Form Ag, Bl, CA 200, Bl 200a), on the Summary of Letters of Guardianship (Form DPA 5) or, in ANC, on the latest Notice of Change (Form CA 232). (See Sec. 202-20, The Application Form.)

The state number assigned to the case may appear on the face of the warrant for further identification. It shall be used with the name in all correspondence, reports, records, and other data regarding the warrant. (WAIC 1560, 2140, 3075, 3460)

610-30 AUTHORIZATION FOR PAYMENT OAS, ANB, APSB, ANC

610-30

Action of the board of supervisors granting, restoring, increasing or decreasing assistance constitutes the final action which unconditionally authorizes payment to be delivered to the specified payees. Such action authorizes delivery of the payment immediately, except where a future date is specified. With respect to continuing grants, the first day of each month (as provided by law) is the effective date of the continuing authorization for payment.

Likewise, when aid is granted pursuant to an order of the SSWB (after a hearing on appeal), the action of the board of supervisors by which the SSWB's order is executed constitutes the final action which unconditionally authorizes payment to be delivered to the appellant. The SSWB, when ordering aid paid on an appeal, in effect remands the case to the board of supervisors who alone have the power to direct disbursement of funds from the county treasury.

The authorization is mandatory with respect to its execution, except where payment of aid is withheld or suspended because of a cloud on eligibility (See Sec. 361-30, Suspension Procedure.)

For the purposes of establishing the applicant's or recipient's accrued period of eligibility, and of computing the amount of payment due, the board of supervisors' authorization for payment of retroactive aid includes a determination of such retroactive period. (See Sec. 361-25, Retroactive Aid Payments by County.) This period, however, has no bearing on the effective date of the authorization for payment. (WAIC 1560, 2140, 2181, 3075, 3460)

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Public Assistance Program

611-30

611-30 (Continued)

611-30

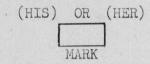
Example of a form which may be used on the reverse side of the warrant to obtain proper endorsement:

Endorsement hereon acknowledges payment for month specified

This warrant must be endorsed on the line below by the person in whose favor it is drawn, and the name must be spelled exactly the same as it is on the face of this warrant. (Note: If endorsement is made by mark (X) see instructions below.)

(Sign on this line)
FORM FOR ENDORSEMENT BY MARK (X)

If endorsement is made by mark (X) it must be witnessed by one person who can write. Use form below:



(Payee's name must be	written	on this	line	exactly	as	it	appears	on	face
of warrant.)									
Witness to mark:									

Name_____

Address

Name _____

Address_____

611-10 PAYMENTS WHEN CHILD DIES

611-10

Federal and State participation is available for aid paid at any time during the calendar month in which a child receiving ANC dies, irrespective of whether the payment was made before or after the date of death. Such participation is available even though the child who dies is the only child in the family receiving ANC. (W&IC 1552.3, 1560; FSSA)

611-20 PAYMENTS WHEN PAYEE DIES OAS, ANB, APSB, ANC

611-20

When the payee is other than the recipient of aid, the warrant shall not become part of the payee's estate in case of his death.

The original warrant, issued to the deceased payee, shall be canceled and a duplicate warrant shall be issued to the new payee or guardian. (W&IC 1560, 2140, 2003, 3075, 3460)

611-30 ENDORSEMENT OF WARRANTS OAS, ANB, APSB, ANC

611-30

Warrants issued in payment of aid shall be endorsed by the authorized payee in order to signify receipt of payment, except in the case of a deceased grantee or payee as provided in Secs. 611-00, Payment When Grantee Dies, and 611-20, Payments When Payee Dies. Warrants issued in favor of the legally appointed guardian of a recipient shall be endorsed by the guardian.

A payee may endorse a warrant in a foreign language which differs in appearance from his name as it appears on the face of the warrant, e.g., in Chinese characters. Such endorsement is acceptable unless there is reason to doubt its authenticity.

When a payee is unable to write his name, he may endorse his warrant by means of a mark, e.g., an X or a thumb print. Such mark endorsement shall be accompanied by the name of the grantee and the signature and address of at least one witness in attendance at the time the mark endorsement is made.

When the recipient or the payee is handicapped to the extent that he is unable to sign his name or to make his mark, it is acceptable for a witness to touch the pen to the body of the recipient prior to making the mark for him. Thus, by making the ritual a physical act rather than actually having the recipient himself make the mark, the objective of maintaining the comfort and the dignity of the individual can be approached. In this instance, the mark itself is made by one of the two witnesses. (W&IC 1560, 2140, 3075, 3460; FSSB)

611-70

In ANB or SB if the investigation of a request for restoration in the same county is not completed and action taken during the month immediately following the date for restoration and the payment of retroactive aid is necessary the payment of such retroactive aid represents the initial payment. (See Secs. 215-00, Restoration of Aid, and 230-95, Investigation of Request for Restoration After Discontinuance.)

The amount of the grant for each month for which retroactive aid is paid shall be the amount for which the applicant (child or children in ANC) is eligible (See Secs. 201-25, When Application To Be Taken, and 250-00, Disposal of Applications.)

- Example B: The 60-day period expired September 27, but determination of eligibility for OAS by board of supervisors action is not until November 3. Aid is granted effective Cotober 1. The applicant has a regular income of \$25 a month from a veteran's pension and \$4 a month value of occupancy making a total income of \$29 a month. Total need in October was \$77, but increased to \$87 on November 1. On November 3, aid is granted effective October 1, and the Certificate of Eligibility shows total need of \$77, income \$29. Grant of aid \$48. Also on November 3 the board of supervisors acts on a Notice of Change increasing aid to \$58 effective November 1. (Total need \$87 less income \$29 equals \$58.)
- Example C: An application for ANB is signed July 8. The 90-day period terminated Gotober 6, but the application is not granted by the board of supervisors until November 8. Aid is granted from October 1, the first of the month in which the end of the 90-day period occurred. In October, the applicant received \$15 net rental income but no subsequent rental was received due to vacancy. As the applicant did not have any need in excess of \$85 in October, \$70 is granted for that month and this amount is reported on the Certificate of Eligibility. A Notice of Change increasing the grant to \$85 effective November 1, is also acted upon by the board of supervisors on November 8.
- Example 9: The 90-day period terminated October 13, but the application for ANC is not granted until November 8. Aid is granted from October 1, the first day of the month in which the end of the 90-day period occurred. In October the family unit had income from the mother's earnings in the amount of \$40, which left a budgetary deficiency of \$60. This employment was for October only, and the amount needed to meet the budgetary deficiency subsequent to October was \$100. Aid for October was granted in the amount of \$60, and is so reported on the Certificate of Eligibility. On the same date that the board of supervisors granted aid in the amount of \$60, effective October 1, a Notice of Change increasing aid effective November 1, is acted upon. (WAIC 1550, 1560, 2140, 2183, 2183.9, 3075, 3082, 3460)

611-70 RETROACTIVE INITIAL PAYMENTS OAS, ANB, APSB, ANC

611-70

Initial grants of aid shall be paid for months prior to action by the board of supervisors on an application in the following instances: (See Sec. 361-25, Retroactive Aid Payments by County)

- 1. If aid is granted on appeal by the SSWB or by the board of supervisors.
- 2. If the SDSW concurs in a county recommendation that retroactive aid be paid. (See Sec. 325-42, Stipulated Appeals.)
- 3. If retroactive aid is granted because an application for aid has been improperly denied and such action is later rescinded. (See Secs. 61150, Beginning Date of Aid-New Applications, and 201-25, When Application to be Taken).
- 4. In OAS, if aid is conditionally restored after discontinuance due to employment and the board of supervisors acts to restore aid conditionally in the month following that in which the 30-day period ended.
- Example: An OAS request for restoration after discontinuance due to employment is signed on February 25; the investigation is not completed on March 27. The next board of supervisors' meeting is on April 5. On this date the board of supervisors approves conditional restoration of aid as of March 1.
- 5. If retroactive aid is granted because the investigation is not completed by action of the board of supervisors within 60 or 90 days after application is made. (See the following paragraphs in this section.)

In OAS if the investigation has required more than 60 days on new applications and in ANB, APSB, and ANC if the investigation has required more than 90 days for completion and the payment of retroactive aid is necessary, the payment of such retroactive aid represents the initial payment. Such payment will not be made in the month or months for which the retroactive aid is granted. In such cases, the retroactive payments shall be made in the month of board of supervisors' action granting the application if possible, and otherwise not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. (See Secs. 611-50, Beginning Date of Aid--New Applications; 611-55, Beginning Date of Aid--Restorations; and 627-30, Federal Participation.)

Example A: An ANB, APSB, or ANC application signed on August 5, is approved by the board of supervisors the following January 10 with aid to begin November 1. November, December, and January payments shall be made in January. (Had the board of supervisors action occurred so late in January that it was not possible to make the payments in January, the payments for November, December, and January would be made in February.)

626-50

See Sec. 627-30, Federal Participation, for the method of computing the federal share on supplemental payments.

Supplemental claims for county institutional subvention shall be reported on the current quarterly County Institutional Subvention claim in the following manner. Claims for months prior to the current quarter shall be listed at the end of the claim, Form AB 801-H, and the month for which each claim is made shall be clearly indicated. The supplemental claims shall be included with the claim for the current quarter in the totals reported on the claim, Form AB 801-H, and carried forward to the affidavit, Form AB 800-H. (See Example in Sec. 629-99.)

Documents substantiating amounts claimed shall be on file with SDSW, as provided in Sec. 628-10, State Audit of Aid Claims. (Walc 1550, 1556, 1560, 2140, 2183, 2189, 3075, 3082, 3087.3, 3460)

626-60 IDENTIFICATION ON AID PAY ROLLS OAS, ANB, APSB, ANC

626-60

The following information shall be included on each aid pay roll (Forms AB 801, APSB 801, CA 801-BHI): county filing claim; month and year for which claim is filed; warrant numbers and dates; state case numbers; and apportionment of grants. (See Sec. 627-20, Apportionment of Grants on Payrolls or Claims)

In OAS, ANB, and APSB, the recipient's name shall be shown exactly as it appears in the signature on his Application (Forms Ag, Bl 200) and on the warrant except in OAS and ANB if the given initials only are available, they may be shown on the aid payrolls. If a guardian of the estate or of the person and estate has been legally appointed, both the name of the guardian and the recipient shall be shown on the aid pay roll (Forms AB 801 and APSB 801).

In ANC, the name of the payee shall be shown exactly as it appears on the application (Form CA 200) or latest Notice of Change (Form CA 232) and the warrant, with the family and given names of all the children for whom aid has been granted. The total numbers of children in each family budget unit eligible and ineligible for federal participation shall also be shown on the aid pay roll (Form CA 801). (See Secs 610-50, Identification on Warrants, 202-20, The Application Form, and 629-99, County Aid Claim Forms.) (W&IC 1556, 1556.5, 2140, 2189, 3087.3, 3482)

626-50

but no retroactive payment is made because the full budgetary needs of the additional child were met in the original grant for the family unit. (See Sec. 250-00, Disposal of Applications, and 611-50, Beginning Date of Aid-New Applications.) In this instance, state reimbursement may be obtained retroactively by filing a supplemental claim covering the balance of state participation due for the additional child/children on the basis of the amount originally paid. No federal reimbursement is available prior to the first of the month in which the board of supervisors takes action for the additional child/children.

 When warrants are issued in lieu of canceled warrants. (See Sec. 628-06, Claim for Warrants Issued in Lieu of Canceled Warrants.)

A separate supplemental pay roll (Forms AB 801, CA 801, and CA 801-BHI) shall be prepared each month in which retroactive payments are made. It shall cover all of the retroactive payments made during that month for prior months, shall be attached to the regular current month's pay roll, and shall be submitted to the SDSW under one affidavit. The supplemental pay roll shall be marked "Supplement for prior months," shall show the month during which payments are made, and shall clearly indicate the amount paid for each month and the month for which each payment is made.

A separate Recapitulation Sheet (Forms Ag, Bl, CA 802) shall be submitted covering the supplemental claim for prior months and shall be marked "Supplement for Prior Months." Due to the numerous changes in federal and state participation it may be necessary to submit more than one recapitulation sheet covering retroactive aid claims. Federal and state participation in retroactive payments is determined by the rules and regulations existing during the period covered by the retroactive payments. Consequently, if the retroactive payments cover a period during which two or more different statutes were in effect, it will be necessary to submit two or more recapitulation sheets.

Example: Retroactive CAS is granted by the SSWB from July 1, 1947, through October 31, 1948, and is paid by the county in November 1948. Three recapitulation sheets are prepared, one covering the period of July 1947, one covering the period of August 1947 through September 1948, and one covering the period of October 1948. (In each of these periods the methods of computing the federal, state, and county participation was different.) The pay roll for prior months and all three recapitulation sheets are attached to the regular November 1948 claim. The totals shown on the three recapitulation sheets are combined and carried forward to the column for prior periods on the November Aid Affidavit.

627-30

If one or more children of a family group have non-county status and the remaining children have regular status, the \$27 basis for federal participation is allocated to a child having regular status. (See Case No. 7, Form CA 801.) * (W&IC 1556, 1560)

When Federal Participation is Available OAS, ANB, ANC

The first payments made on new applications and restorations are <u>initial</u> <u>payments</u>. Federal participation is available in <u>initial payments</u> provided the board of supervisors' action occurs within the month for which the aid is granted and the warrant is delivered during the same month or not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. Federal participation is also available in initial payments as follows:

- 1. If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, plus the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.
- 2. If an application for aid has been improperly denied and such action is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action was taken and the two preceding months. (See Sec. 201-25, When Application to be Taken), provided such period does not antedate the month in which payment was improperly denied or withheld.

^{*}Examples of the various types of cases are shown on the sample forms in Sec. 629-99, County Aid Claim Forms.

627-30

The actual federal share is: 3/4 of \$12 for each eligible child, plus 1/2 of the difference between the amount paid (not counting excess over \$27 for the first eligible child and \$18 for each other eligible child) and \$12 for each eligible child. If the amount paid is less than \$12 for each eligible child, 1/2 the difference is deducted from 3/4 of \$12 for each child. The maximum federal share is \$16.50 for one child and \$12 for each additional child.

The short formula for computing the federal share is: 1/2 the amount paid(not counting excess over \$27 for one child and \$18 for each additional eligible child in the family budget unit) plus \$3 for each child.

Example /D: One eligible child -- grant \$88.50, federal basis \$27

3/4 x \$12 x \$ 9.00 Regular formula 1/2 x (\$27 - \$12) g \$15/2 g Federal share g \$9.00 + \$7.50 g \$ 7.50 \$16.50 Federal share = (1/2 x \$27) + \$3 = \$13.50 + \$3 = \$16.50 Short formula Example E: Two eligible children -- grant \$136.50, federal basis \$45 3/4 x (2 x \$12) = 3/4 x \$24 = \$18.00 Regular formula 1/2 x (\$45 - \$24) = \$21/2 = \$10.50 Federal share = \$18.00 + \$10.50 = \$28.50 1/2 x \$45 = \$22.50 Short formula 2 x \$3 = \$ 6.00 Federal share \$ \$22.50 + 6.00 = \$28.50 Example F: Three eligible children -- grant \$25, federal basis \$25 3/4 x (3 x \$12) = 3/4 x \$36 = \$27.00 Regular formula 1/2 x (\$25 - \$36) ± - \$11/2 = -\$ 5.50 Federal share = \$27.00 - \$5.50 = \$21.50

(Section Continued on Next Page)

Federal share # \$12.50 +\$9.00 # \$21.50

1/2 x \$25 = \$12.50

\$ 9.00

3 x \$3 m

Short formula

627-30

5. Correction of Erroneous Payment

- a. If a payment in a particular month is made for less than the authorized award for that month and the error is corrected by delivery of an additional warrant within a three-month period, including the month in which the erroneous payment was made. No action of the board of supervisors is necessary.
- Example I: The authorized award for January is \$40. Through error only \$30 is paid on January 1. The additional \$10 may be paid later in January, in February or not later than March 31. No change in the award is made to correct the underpayment.
- b. If a payment is made in excess of the authorized award. The Federal Government participates in the excess payment only if the amount of the excess is taken into consideration in the payment for either of the two months following the month in which the overpayment was made. No change in the authorized award should be made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the authorized award for each month.
- Example J: The authorized award in CAS is \$50. Through error \$60 is paid in January. In February or March \$10 less than the authorized award is paid to adjust for the \$10 over-payment in January. No change in the award is made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the maximum basis of \$100 for the two months.

627-30

- 3. If the beginning date of aid originally established on an application is not in accordance with the legal provisions of the W&IC and a subsequent corrective action is taken beginning aid at an earlier date. The Federal Government participates providing the retroactive aid is not for a month(s) prior to the month of the original action and further providing that the corrective action is taken by the end of the second month following that in which the original action was taken.
- Example G: An OAS application which was signed on July 15 was approved by the board of supervisors on September 15, aid to start effective October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of W&IC 2183. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is federal participation in the warrant issued in November for September as there would have been no retroactive initial payment if the original action in September had been correct.
 - Example H: An OAS application which was signed on June 15 was approved by the board of supervisors on October 15, aid to begin October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of W&IC 2183. On November 2 the board of supervisors takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is no federal participation in the aid paid in November for September as the original board of supervisors action occurred in October. Had aid been correctly approved from September 1 in October, there would have been no federal participation as the initial payment would have been retroactive.

Federal participation is available for retroactive aid in the following situations (See Sec. 361-25, Retroactive Aid Payments by County).

4. Increased Payment

If a payment of aid has been made in accordance with the authorized award and is later found to be less than the amount for which the recipient (or child or children in ANC) was eligible. The Federal Government participates in additional payments authorized before the end of the second month following that in which the underpayments occurred.

627-30

Example M: Application for ANB or ANC is signed on August 5. The 90-day investigation period expires November 3. Determination that applicant or child is eligible is not made by the board of supervisors until January 10, when aid is approved to begin November 1, the first of the month during which the 90-day period expires. There is no federal participation in the ANB or ANC payments made in January for November and December.

In OAS federal participation is available in payments made under conditional restoration after discontinuance due to employment providing the case record indicates presumptive eligibility, the fact of eligibility has been determined and investigation has been completed by action of the board of supervisors within two months after the month in which the board of supervisors acted to restore aid conditionally. Payments made under conditional restorations shall be claimed non-federal. Appropriate claim adjustment allowing federal reimbursement will be made by the SDSW upon notification by notice of change from the county that the above conditions have been met. (See Sec. 361-22.)

Hospitalization:

Federal participation is available for a recipient (in ANC the child for whom aid is granted) receiving medical or surgical care in a public institution until the end of the month following that in which the recipient is admitted to the hospital. Exception: Federal participation in two monthly payments is available when determination has been made that the hospitalization is for a temporary period. (See Sec. 164-10, Eligibility During Hospitalization.)

Example N: An OAS recipient is admitted to county hospital August 10. Aid is paid for September and October because on the first of each month he has not been in the hospital for two calendar months. If a determination is made that hospitalization will be temporary, there is federal participation in both the September and October payments. If, however, hospitalization is not determined to be temporary, federal reimbursement is available only through the month of September.

Guardianship:

In OAS and ANB there is no federal participation in payments made to a guardian who is an employee of the SDMH. (See Sec. 230-60, Guardianship.)

Inmates of Federal Hospitals or Homes:

In ANB and APSB federal participation is not available for payments made to an inmate of a federal hospital or home. (See Secs. 610-60, Payment to Inmate of Public Institution, and 162-05, Eligibility of Public Institution Inmates and Parolees.)

References to Other Manual Sections:

For further discussion of federal participation see Secs. 627-45, Partial Months' Claims—Bases for State and Federal Participation; 627-80, Federal Participation on Children Between Ages of 16 and 18 years; 627-85, Federal Participation When an Additional Child Becomes Eligible for Aid During Month; 627-90, Two or More Family Budget Units in One Household; and 628-00, Payees Eligible Under Social Security Act. (Walt 1553, 1560, 2140, 2183.9, 2186, 3075, 3087; FSS-Admin.)

REVISION 381

627-30

6. Delayed Payment

If a grant of aid has been properly authorized but either the issuance or release of the warrant has been delayed in such situations as are described in:

- a. Item 4 and 6 of Sec. 361-25, for initial warrants.
- b. Items 3 through 8 of Sec. 361-25, for other warrants.

The Federal Government participates provided the payment is released within the two months following the month for which delivery was not made.

7. Payment with Respect to an Erroneous Discontinuance

If an erroneous discontinuance is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action is taken and the two preceding months.

8. Appeals to SSWB

If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, in addition to the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.

Federal participation is not available for retroactive payments for any months between the expiration of the investigation period and the month(s) in which assistance is authorized except if aid has been improperly denied and such action is later rescinded, provided such period does not antedate the month in which payment was improperly denied or withheld. (See Sec. 611-70, Retroactive Initial Payments, and 626-50, Supplemental Aid Claims.)

Example K: An OAS application was signed on July 5. The 60-day period ended September 3. The application was granted by the board of supervisors on November 8. Aid is paid from October 1 as the first of the month following the end of the 60-day period is earlier than the first of the month in which the board of supervisors granted the application. There is no federal participation in the OAS payment made in November for October.

Example L: An application for OAS is signed on September 25. The 60-day investigation period expires on November 24. Determination that the applicant is eligible is not made by the board of supervisors until February 5, when they grant aid to begin December 1, the first of the month following the expiration of the 60-day period. There is no federal participation in the OAS Payments made in February for December and January.

645-21 EXPENDITURES FOR GOODS, FACILITIES, AND SERVICES FROM OTHER COUNTY AGENCIES OAS, ANB, ANC

645-21

Federal participation may be claimed by the county to meet costs incurred by other county agencies in furnishing goods, facilities, or services to the welfare department provided:

- 1. Such costs are permissible under county ordinances. In all cases the responsibility for the determination of the legality of such claim in respect to county ordinances rests with each individual county, and such determination shall be made prior to claiming federal participation.
- 2. Such costs are incurred to meet the administrative needs of the welfare department and are not costs attributable to the general expense of county government in carrying out the over-all coordinating fiscal and administrative functions of the county government.
- 3. Such costs are extra-identifiable and readily ascertainable either
 - a. by segregation, or
 - b. as a pro-rata share of the costs of such goods, facilities, or services.

Definition of Terms

"Goods" means articles or commodities such as printed forms and office supplies.

"Facilities" means transportation and communications such as charges for cost of use of automotive equipment and telephone and telegraph. "Facilities" also includes charges for the cost of use of office furniture and machinery. If office furniture and machinery is purchased from the welfare department appropriations and is used by another county agency exclusively for welfare programs, the purchase cost may be claimed.

"Services" relates to personal services performed by officials or employees of other county departments. (FSS-Admin.)

645-17 EXPENDITURES FOR RETIREMENT CONTRIBUTIONS OAS, ANB, ANC

645-17

Federal participation may be claimed by the county for its share of costs for covering employees under approved retirement fund plans.

Two copies of retirement data shall be submitted to the SDSW including (a) a statement showing how the plan became effective, (b) the date the plan became effective; and if the retirement system is operated by the county itself, (c) copies of the retirement law including full details on the operation of the system.

One copy of the retirement data shall be notarized by the county clerk as being a true copy of the original document.

Plans currently acceptable include: (a) Membership in the State Employees' Retirement System or (b) a county wide retirement plan operating under authority of the County Employees' Retirement Act of 1937. (Sections 31450 - 31822 Government Code)

The county share of approved retirement system contributions shall be reported currently as a maintenance and operation charge and shall be identified as retirement system contributions on Administrative Expense Worksheets (Form DFA 64A) submitted to the SDSW. (FSS-Admin.)

645-27 EXPENSES OF THE COUNTY AUDITOR OAS, ANB, ANC

645-27

Federal participation may be claimed for the costs of goods, facilities, or services (as defined in Sec. 645-21) regularly provided by the county auditor to the welfare department either on an "actual cost" or "unit cost" basis. Costs may include expenditures such as salaries and wages, warrants, postage, envelopes, and the cost of use of office equipment.

If the cost of such goods, facilities, or services are not readily ascertainable by segregation, a unit cost may be used.

UNIT COST BASIS

- 1. Salaries and Wages. The time recording procedure outline in Sec. 645-76, Time Recording by Employees, shall be followed for segregating salaries and wages. The resulting number of man hours spent on each aid during the study month multiplied by the average hourly salary shall be used in establishing the total salary cost by aid.
- 2. Warrants. The cost per warrant determined by the last purchase preceding the study month multiplied by the number of warrants used for each aid during the study month shall represent the total warrant cost.
- 3. Postage. The actual cost of postage used in mailing the warrants during the study month shall be determined for each aid.
- 4. Envelopes. The cost per envelope determined by the last purchase preceding the study month multiplied by the number of envelopes used during the study month for each aid shall represent the total envelope cost.
- 5. Other Goods and Facilities.

The unit cost which shall be used from the study month until the end of that fiscal year is determined by adding the total cost by program as determined under 1, 2, 3, 4, and 5, above, and dividing by the number of recipients of aid (ANC-number of cases) as shown on each assistance affidavit for the month.

Each month thereafter the number of recipients of aid (ANC-number of cases) as reflected on that month's assistance affidavit multiplied by the unit cost for that aid shall determine the sum to be charged to OAS, ANB, ANC, etc., on the administrative expenses maintenance and operation worksheet.

If a unit cost is used, the county shall at least once but not more than twice each fiscal year conduct a study to establish a new unit cost or verify existing costs. Approval of the study month desired shall be secured in advance from the SDSW.

ACTUAL COST BASIS

If the costs of such goods, facilities, or services are readily ascertainable by segregation, actual cost may be claimed.

645-25 (Continued)

645-25

Reimbursement to the county for a County Child Welfare Supervisor will be determined by applying the agreed percentage to be borne from CWS funds against the amount chargeable to the program as determined by the time recording procedure. In any event, the reimbursement will not exceed any contract limitation.

Educational Stipend

In those counties where agreements exist for the reimbursement of CWS educational stipends, such expenditures for stipends shall be reported and charged as a maintenance and operation expense to the CWS Program and the counties may claim reimbursement as specified in the existing agreements.

Other Expenditures

Expenditures for the CWS Program not contained in the regular agreement between the state and the county must be authorized individually in advance by the SDSW. (FSS-Admin.)

645-26 EXPENDITURES FOR COMMISSARIES GR

645-26

Commissary costs shall be determined and handled as direct charges to this activity where readily determinable. They may be reported on the Administrative Expense Worksheets (Forms DFA 64 and 64A) under the caption "Commissary" or the OWP column may be used.

Joint expenditures applicable to the categorical aid programs only will be allocated as such.

Only expenditures for Salaries and Wages, Maintenance and Operations, and Capital Outlay by which all welfare programs and the commissary benefit, shall be treated as over-all expenses. An example of the latter would be the salary of a county welfare director who is responsible for the operation of all welfare programs including the commissary. (Walc 1561, 2140, 3091; FSS Admin.)

645-28 EXPENSES OF A COUNTY CIVIL SERVICE DEPARTMENT OAS, SB, ANC

645-28

Federal participation may be claimed for those special services excluding overhead costs rendered by a county civil service department for the county welfare department which are extra and identifiable or incurred on specific request by the SDSW. The term "extra and identifiable" as used here means that the services must be extra in the sense that they require an identifiable or segregable expense, additional to the normal work load of the local civil service department and are not the services that are regularly performed for all agencies of the county government including the welfare department

As an example, claimable expenses might include the direct cost of special examinations for positions peculiar to the welfare programs on examinations needed to prevent extended provisional appointments in the local welfare department, where such special or extra examinations are not included in the local civil service department's regular examining program.

Revisions in individual class specifications, as another example, would not ordinarily be considered a special service within the meaning intended here, but would rather be a part of general administrative responsibility of the local civil service department and consequently not claimable. However, a special classification survey of the local welfare department considered essential to maintain the classification plan might be requested as an extra service, and as such, the cost thereof would be claimable.

Counties contemplating filing such claims shall first submit to the SDSW full particulars of the expenses proposed to be claimed. Written SDSW approval is required. (FSS-Admin., Art. XXV, Calif. Const.)

645-27 (Continued)

645-27

EXPENDITURES FOR PURCHASE OR REPLACEMENT OF EQUIPMENT

made for office furniture or equipment to be used solely for public assistance, the monthly cost of use of such items may be added to the total amount determined.

The amount to be allocated to each program may be determined by prorating the expenditure on the ratios of the salaries and wages expenditures for each program for that month.

If new equipment is purchased by other than the county welfare department, whether on an initial purchase or replacement basis, such items may be claimed only on a cost of use basis, excepting that purchase cost may be claimed provided the purchase is made from the welfare appropriation and the item is used exclusively by the county auditor for welfare department programs.

Costs shall be reported currently and shall be identified as an expense of the county auditor when itemized on the Administrative Expense Worksheet (Form DFA 64A) submitted to the SDSW with the Administrative Expense Affidavit (Form Ag, Bl, CA 807). The county shall maintain records to substantiate these costs. (FSS-Admin.)

645-96 REPORTING OF COST OF ADMINISTRATION

645-96

Reporting of administrative expenditures shall be effected by the cash flow method; that is, upon the basis of bills paid during the month irrespective of the month to which the particular expenditure is applicable. Reporting of expenditures based upon budget encumbrance or obligations incurred does not comply with the requirements in claiming reimbursement inasmuch as these systems do not show actual expenditures.

Items of administrative expense shall be reported on the claim for the month in which disbursement is made and allocated to the month of accrual in accordance with the provisions of paragraphs numbered 1 through 5 of this section. An item erroneously omitted from any monthly claim will be allowed, provided it is claimed not later than during the quarter following the twelfth month after disbursement. Items of expenditure of a nature not previously claimed by a county may be claimed retroactively only from the beginning of the quarter in which such expenditure was initially claimed, or if prior approval by the SDSW is required, only from the beginning of the quarter in which the required plan is submitted in writing to the SDSW. Such plan to be effective for a given quarter shall be submitted not later than 45 days prior to the end of the quarter. Retroactive claims will be allowed by the SDSW subject to approval by the Federal Social Security Administration.

645-81 (Continued)

645-81

Extraneous Activities (Ex.). Time shall be charged to this activity when it is spent on a category which is not a welfare program or which does not come under the jurisdiction of the county welfare department. If an employee regularly devotes a portion of his time to welfare duties and a portion to extraneous activity, such as workin the county auditor's or treasurer's office, and his salary is paid from the various budgets according to an arbitrarily fixed ratio, the maintenance of a time record by such an employee serves as a test of the ratio used and assists the county in appraising the method of apportionment. (See Sec. 645-06, Expenditures for Personal Services.)

Other Combinations (O.C.). Time shall be charged to this category by employees who work on a special combination of programs when the component programs are integrated in the work of the employee to the extent that it is not possible for him to segregate his time among individual programs. The employee charges his time under this caption, specifying the programs involved, such as Ag, Bl-el; Ag, CA-inel; Ag, GR, CA-el, etc.

A more detailed breakdown of any or all welfare programs may be made by a county if administratively desirable, but the foregoing segregation is the minimum necessary for proper claiming of federal participation.

Travel Time (Tr). Record time on this line only when it can not be identified with a specific program.

Direct charges to the program will be made whenever travel time can be identified with a specific program.

Other Non-Allocable Time (NA). This category includes such time as can not be identified with any activity or program, such as time in attendance at a conference of a general nature where the employee does not actively participate on behalf of any particular program.

Vacation. Time shall be charged to this item during period of vacation granted in accordance with merit system rules and regulations as set forth in Chapter 070-00, Welfare Personnel Standards.

Sick Leave. Time shall be charged to this item during periods of sick leave granted in accordance with merit system rules and regulations as set forth in Chapter 070-00.

Other Time Off. Time shall be charged to this item when absence of employee is not chargeable to Vacation or Sick Leave and is due to holidays or other leave with pay granted in accordance with merit system rules and regulations as set forth in Chapter 070-00. (WaIC 1560, 2140, 3075; FSS-Admin.)

646-80 FORMS USED IN ADMINISTRATIVE EXPENSE CLAIMS

646-80

Claims for administrative expense shall be submitted immediately after close of each month. A separate claim shall be submitted for each calendar month. (See Secs. 601-00, Quarterly Estimates of Expenditures for Aid and Administration; 601-10, Quarterly Adjustment of Funds; 628-10, State Audit or Aid Claims; and 628-20, Aid Claim Correction.) (Walt 1560, 2140, 3075; FSS-Admin.)

Monthly administrative expense claims consist of the following affidavits and worksheets.

AFFIDAVITS

Administrative Expense Affidavit (Forms Ag 807, Bl 807, CA 807, BHA-80, and BHC-80) on which county or agency officers attest to the amount of participation due for administrative expenses, shall be submitted in duplicate. (See Example in Sec. 646-99, Administrative Expense Forms.)

AGED

Form Ag 807 used when a county claims reimbursement for expenses incurred in the administration of the OAS program.

Item 1 is the total amount paid by county for administration of OAS only.

Item 2 is the net amount claimed for reimbursement of expenditures from federal funds for OAS. This amount is equal to one-half of Item 1.

645-96 (Continued)

645-96

County welfare departments in claiming shall allocate administrative expense to months for OAS, ANB, ANC, CWS, BHA, BHC and AD and any other programs that may be administered by them as follows:

- 1. For salaries and wages on the basis of the month in which the services were rendered.
- 2. For maintenance and operation, expenditures readily identifiable with a specific month shall be allocated to that month; expenditures not readily identifiable with a specific month shall be allocated to the month in which payment is made. In some counties supplies are secured from a Purchasing Agent or through a Stores Department. In such instances the expenditure shall be allocated to the month of billing unless a particular accrual month is indicated.
- 3. For capital outlays, excepting repairs and alterations and purchase of buildings; the expenditures shall be allocated to the month in which the item is paid by county warrant, excepting as modified for the period March 1, 1950, through June 30, 1950, by Department Bulletin No. 392 (Fiscal), Plan for Loan of Equipment.
- 4. For repairs and alterations and purchase of buildings (prior SDSW approval required), the cost shall be amortized over a period of months agreed upon with the SDSW.
- 5. Charges for services of other agencies may be included on the welfare claim if reimbursement has not been requested from another state department. Such charges shall be allocated to the month which received the benefit of the expenditure. Other county agencies need not officially bill the welfare department for claim purposes. However, data shall be kept on file in the county in sufficient detail to amply support such charges together with the individual computations covering each monthly claim. (FSS-Admin.)

700-05 ASSIGNMENT OF STATE NUMBERS ANB, APSB

700-05

The county shall assign a state number to each ANB or APSB application at the time it is taken. There shall be no distinction in numbering between ANB and APSB cases.

1. Cases never before on ANB or APSB in county

List names in alphabetical order and assign numbers in sequence beginning with the number following the number assigned to the last case granted by the previous board action.

2. Cases previously on ANB or APSB in county

Reassign the former state number.

Exception: Spouses who formerly received ANB and/or APSB under one number in the county.

- a. If both spouses return to ANB and/or APSB, reassign the former number to the husband and assign a new number to the wife.
- b. If one spouse returns to ANB or APSB, assign a new number unless the other spouse is deceased; in the latter instance reassign the former number.

Whenever the term "State Number" is used, it refers to the combination of county prefix, numerical designation, and categorical suffix; e.g., Ala 10101 Bl.

The ANB-APSB number series shall be independent of the OAS series. (Walc 3075, 3460)

700-00 ASSIGNMENT OF STATE NUMBERS

700-00

The county shall assign a state number to each OAS application at the time it is taken.

1. Cases never before on OAS in county

List names in alphabetical order and assign numbers in sequence beginning with the number following the number assigned to the last case granted by the previous board action.

2. Cases previously on OAS in county

Reassign the former state number. Exception: Spouses who formerly received OAS under one number in the county.

- a. If both spouses return to OAS, reassign the former number to the husband and assign a new number to the wife.
- b. If one spouse returns to OAS, assign a new number unless the other spouse is deceased; in the latter instance reassign the former number.

Whenever the term "State Number" is used, it refers to the combination of county prefix, numerical designation, and categorical suffix; e.g., Ala 10101 Ag.

The OAS number series shall be independent of the ANB-APSB series. (W&IC 2140)

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

STATE OF CALIFORNIA

Department of Social Welfare

MYRTLE WILLIAMS
DIRECTOR

Sacramento 14 February 9, 1950 ADDRESS REPLY TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

468:55

Attachments

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 384 (CA)
Subject: Revised Children's Estimate Form CA 809

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103 and 1560 on January 26, 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, and operative on March 1, 1950, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

MYRTME WILLIAMS, Director Department of Social Welfare

FILED

in the Office of the Secretary of State of the State of California

FEB 15 1950

FRANK M. JORDAN, Secretary of State

Certified as a regulation (or Regulations of the (Mame of State Agency) (Date)

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

. . . .

616 K STREET SACRAMENTO 14 December 8, 1949

DEPARTMENT BULLETIN NO. 384 (CA)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Revised Children's Estimate
Form CA 809

Form CA 809, Aid to Needy Children Claim for Estimated Quarterly Expenditures, has been revised. The revised form requires substantially the same information as before, but has been simplified by the elimination of quarterly totals and by the combination of eligible and ineligible children under the "average payment" item. The revised form shall be used for estimates beginning with the April-June, 1950, quarter.

A supply of twenty-five revised Forms CA 809 (which are furnished gratis) will be sent to your county with the next automatic supply replenishment. Please destroy all supplies of the old Form CA 809 and report all future estimated expenditures for Aid to Needy Children on the new Form CA 809, revised October 1949.

Very sincerely yours,

MYRALE WILLIAMS, Director Department of Social Welfare

FILED
In the Office of the Secretary of State
of the State of California

FEB 15 1950

FRANK M. JORDAN, Secretary of State

AID TO NEEDY CHILDREN

COUNTY

Forward TWO copies to State Department of Social Welfare Sacramento 14, California

CLAIM FOR ESTIMATED QUARTERLY EXPENDITURES

FROM

FOR THE QUARTER BEGINNING, 19	AND ENDING	, 19	
COMPUTATION OF BASIS FOR ASSISTANCE FUNDS	FIRST MONTH	SECOND MONTH Col. 2	THIRD MONTH Col. 3
1. Number of Recipients: Total			
A. Eligible for Federal Funds		3 9	
B. Not Eligible for Federal Funds			
2. Average Payment (for eligible and ineligible children)	\$	\$	\$
3 Total Assistance (Item 1 x Item 2)	\$	\$	\$
4. Assistance Ineligible for Federal Funds	\$	\$	\$
5. Assistance in Excess of \$27 for one, and \$18 for each Additional Child	\$	\$	\$
6. Federal Participation Basis (Item 3 less Items 4 & 5)	\$	\$	\$
7 Administrative Expenses Total	\$	\$	\$
A. Eligible for Federal Funds	\$	\$	\$
B. Not Eligible for Federal Funds	\$	\$	\$
8. Federal Funds for Assistance			
(Item 1A times \$3 plus 1/2 of Item 6)	\$	\$	\$
FOR STATE	\$ \$	\$	\$
9 Federal Funds for Administration (1/2 of Item 7A)	\$.	4	\$
FOR STATE	\$	\$	\$
USE ONLY	\$	\$ 2	\$
10 Total Federal Funds Estimated (Item 8 plus Item 9)	\$	\$	\$
FOR STATE	\$	\$	\$
USE ONLY	4	3	3
11. State Funds for Assistance			,
(2/3 of (Itam 3 minus Itam 8) = State)		\$	\$
USE ONLY		\$	\$
I HEREBY CERTIFY, That the county share has been appropri			
Assistance \$ (Total Cols.1, 2 and 3, Item 3 minus Items 8 and	Administration \$ (Total	al Cols. 1. 2 and 3. Item	7 minus Item 9)
STATE OF CALIFORNIA)			
County of)		Signature of County Aud	itor
being du sible for the administration of Aid to Needy Children in and f the estimated expenditures under the provisions of Chapter 1 o amendments thereto, and Title IV of the Social Security Act, a plied with in the expenditure of these funds. Affiant request said county, subject to adjustment by the State Department of Subscribed and sworn to before me this	ly sworn, deposes and se or the said county; that f Part 2 of Division 2 on amendments thereto, a s that the Federal and S	tys: That he is the co the above is a true and of the Welfare and Instituted that the provisions o	unty official respon- correct statement of utions Code, and f same will be com-
	Signa	ature of Director or Offi	cial in Charge
of19	Title		
man)	Approved	Obstance Design	
Title		Chairman, Board of Super	visors
ADVANCE APPROVED STATE DEPARTMENT OF SOCIAL WELFARE		ACCOUNTING OFFICER	
	BY	DATE	

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Signature) (Title) (Date)

WA 10 103, 103. 5, 103. 6, 2148 3075

MYRTLE WILLIAMS

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14

FILED

in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO. 409

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS DISTRICT OFFICES SDSW

Subject: Time Limit in Transferring

to County Agencies

Each employee of the SDSW who, as of February 28, 1950, was eligible to transfer his Interim Merit System status to a county welfare department, shall forfeit his right as provided in Chapter 10, Statutes of 1949, First Extraordinary Session, to return to the county welfare department from which he originally transferred to the State service, if he fails to return to the employment of the county welfare department on March 1, 1950. However, any employee who has signified his intention to return to the county welfare department but who fails to report for work on March 1, 1950, shall be subject to the provisions of the rules applicable to the reason for said absence. (See Manual of Policies and Procedures, Section 073-21)

Certified as a Regulation (or Regulations) of the

(Name of State Agency).
(Name of State Agency).
Mynthe Cheen
(Signature)
Director
(Title)
2-17-50
(Date)

FILED

in the Office of the Secretary of State of the State of California

2/22/50

DEPARTMENT BULLETIN NO. 408 (PROPOSED)

COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DIRECTORS COUNTY AUDITORS

FEB 20 1950

FRANK M SORDAN, Secretary State

Subject: Appeals Procedure Regarding Reemployment Rights of Interim Merit System Employees Under Chapter 10, Statutes of 1949, First Extraordinary Session

In order to insure reemployment of Interim Merit System employees by the counties in accordance with Chapter 10, Statutes of 1949, First Extraordinary Session, such employees shall have the right of appeal to the State Social Welfare Board from any action taken by the county that the employee considers to be a denial of his rights under the provisions of the statute. With respect to such appeals, the decision of the State Social Welfare Board shall be final and binding upon the county, in order to carry out the supervisory power given to the State Social Welfare Board by the statute, and to assure compliance with its provisions.

The provisions of this bulletin apply solely to employees under an approved county-wide civil service system or the County Merit System. With respect to the former counties, the employee must exhaust his appeal rights under the county civil service system before he may appeal to the State Social Welfare Board.

Certified as a Regulation (or Regulations) of the

(Signature) (Date)

in the Office of the Secretary of State of the State of California

2/22/00

DEPARTMENT BULLETIN NO.407 (PROPOSED)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DIRECTORS COUNTY AUDITORS CIVIL SERVICE COMMISSIONS

FEB 20 1950

FRANK M. JORDAN, Secretary of Sta

Subject: Reemployment of Personnel in County Welfare Departments Under Provisions of Chapter 10, First Extraordinary Session

Section 3, Chapter 10, 1949 First Extraordinary Session of the legislature provides that each employee who was appointed to his position in the State Department of Social Welfare in accordance with the provision of Section 18598 of the Government Code and Sub-section (b) of Section 107 of the Welfare and Institutions Code, shall be reemployed by the county by which he was employed immediately prior to such state employment when that county resumes the functions of Old Age and Blind Security.

County welfare departments operating under the California Merit System will be provided with the following information and shall have the following responsibilities:

- 1. State Department of Social Welfare will provide two copies of a certified list of persons eligible for reemployment in the county welfare department. This list will contain the name of the employee, classification, prior county monthly rate of pay, prior county status, county status as of March 1, 1950, date probationary period was completed, days vacation used in state service, days sick leave used in state service and present location of employment.
- 2. It shall be the duty of the appointing authority for the county welfare department to ascertain whether such persons will transfer to the county welfare department.
- 3. It shall be the duty of the appointing authority of the county welfare department to obtain a signed waiver form from persons desiring to waive their right of employment with the county welfare department.
- 4. It shall be the duty of the appointing authority for the county welfare department to submit to the State Department of Social Welfare not later than March 10, 1950, one copy of the certified list of persons elitible for reemployment in the county welfare department, noting on the form in the column headed. "Remarks," whether such persons accepted appointment or waived appointment.
- 5. It shall be the duty of the appointing authority of the county welfare department to submit Form PS-20 covering the reemployment of all persons desiring employment with the county welfare department.

- 6. The appointing authority for the county welfare department shall submit to the State Department of Social Welfare one signed copy of the waiver for all persons who have waived such a position. This shall also be attached to the copy of the certified list of persons eligible for reemployment in the county welfare department.
- 7. The appointing authority for the county welfare department shall inform the State Department of Social Welfare at the earliest possible moment if a layoff in any class will be necessary because of the reemployment of personnel.
- 8. The State Department of Social Welfare will transmit to the appointing authority of the county welfare department a seniority list for layoff purposes as soon as possible after a request for this information has been received.
- 9. The appointing authority of the county welfare department shall be responsible for the layoff of personnel.

The county welfare departments operating under a county-wide civil service plan shall receive the following information and have the following responsibilities:

- 1. The State Personnel Board will supply to the county civil service commission the names of persons eligible for reemployment in the county welfare department.
- 2. The State Personnel Board will supply to the county civil service commission an employment history card of each person eligible to transfer for the period of time in which that person was employed by the state.
- 3. The State Department of Social Welfare will supply to the county civil service commission the number of days vacation used in the state service and the number of days sick leave used in state service.
- 4. The county civil service commission shall be responsible for maintaining adequate records for the reemployment or the non-reemployment of such personnel.
- 5. The county civil service commission shall make available to the State Department of Social Welfare such records for review by the State Department of Social Welfare during the ninety-day period following March 1, 1950.

Certified as a Regulation (or Regulations) of the

Dened or wel.
(Name of Spate Agency)
Mintle Chileun
(Signature)
Devertor
(Title)
2-17-50
(Date)

MYRTEE WILLIAMS.

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 February 221950

FILED

in the Office of the Secretary of State of the State of California

FEB 20 1950

DEPARTMENT BULLETIN NO. 406 (3 Aids)

PROPOSED

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS

FRANK M JORDAN, Secretary of State

Subject: Monthly Statistical Reports on Public Assistance Reinvestigations (Form DPA 10)

Monthly Statistical Reports on Public Assistance Reinvestigations shall be submitted to the Bureau of Research and Statistics, State Department of Social Welfare, Sacramento, on Form DPA 10 (revised February 1950), by all counties every month beginning with the report for March 1950. (Reports covering January and February 1950 shall be made on Form DPA 10, revised August 1945.) Separate columns are provided on the form for reporting the status of reinvestigations of OAS, ANB and APSB (combined), and ANC cases.

Reports shall be submitted in duplicate not later than the 18th of the month following the month covered by the report. A copy of the report should be retained by the county.

Department Bulletin No. 271 and Section 565-00 of the Manual of Policies and Procedures, insofar as it applies to OAS, ANB, and APSB, are superseded effective March 1, 1950.

INSTRUCTIONS

ITEM 1. REINVESTIGATIONS DUE OR OVERDUE

Enter the sum of Items la and lb.

Item la. Reinvestigations reported as overdue in Item 3 of last month's report

Enter the figure shown in Item 3 of the previous month's report unless Item 3 was incorrect. In this event show the correct figure and explain the difference on the back of the form.

Item lb. Reinvestigations becoming due this month

Enter the number of reinvestigations becoming due in the month covered by this report. This should agree with a count of the cards in the renewal control file for the same month. The "anniversary month" (after the first) is one year after the month in which the last reinvestigation was completed.

ITEM 2. REINVESTIGATIONS DISPOSED OF Enter the sum of Items 2a 2b and 2e.

Report in these items only the disposition of reinvestigations that were due this month or overdue from a previous month; reinvestigations completed in advance of the anniversary month are to be shown in Item 4.

A reinvestigation is completed when the investigation has been reviewed and the reinvestigation form <u>signed</u> by the case supervisor or other authorized person.

Item 2a. Reinvestigations completed and grant found to be correct

Enter the number of cases on which the reinvestigations were completed during the month, and the recipients found to be eligible for the amount of the authorized grant, i.e., the grant was unchanged as a result of the reinvestigation.

Item 2b. Reinvestigations completed and grant change or discontinuance resulted

Enter the number of cases on which reinvestigations were completed during the month in which the recipient was found to be eligible for a different amount or completely ineligible.

Item 20. Reinvestigations canceled because of discontinuance prior to completion of reinvestigation

Enter the number of reinvestigations that were canceled because the cases were discontinued during the month prior to completion of the reinvestigation. This item is not to be confused with Item 2b in which are reported cases discontinued because the completed reinvestigations showed that the case was not eligible.

ITEM 3. TOTAL REINVESTIGATIONS OVERDUE AT END OF THIS MONTH

Enter the difference between Item 1 and Item 2. This entry should also equal the sum of Items 3a and 3b.

Item 3a. Reinvestigations overdue 12 months or more

Enter the number of cases whose reinvestigations fell due 12 months ago or more and have not yet been completed. This means that at least two years have elapsed since a reinvestigation was last completed on the case.

Item 3b. Reinvestigations overdue less than 12 months

Enter the number of pending reinvestigations that have been overdue less than 12 months. This entry should equal the sum of the entries in Section B.

SECTION B. ANALYSIS OF CASES FOR WHICH REINVESTIGATION IS OVERDUE LESS THAN 12 MONTHS

Enter a breakdown, by anniversary month and year, of reinvestigations still overdue at the end of the month. The sum of these entries must equal the entry in Item 3b.

Reinvestigations overdue 12 months or more are not included, but are shown in Item 3a.

Department Bulletin No. (3 Aids)
Page 2

SECTION C. ITEM 4. REINVESTIGATIONS COMPLETED PRIOR TO ANNIVERSARY MONTH

Enter the number of reinvestigations that were completed in advance of the month when due. This will include cases whose anniversary month is to be changed, e.g., to agree with that of a spouse or some other recipient in the same vicinity, as well as reinvestigations completed ahead of schedule. These should be reported in the month in which the reinvestigation was actually completed, and should not be reported again prior to the next reinvestigation.

Note: This item is completely separate from the other items and does not affect the balancing of the report.

Attachment

MONTHLY STATISTICAL REPORT ON PUBLIC ASSISTANCE REINVESTIGATIONS

County Report for the month of						,19	
SECTION A.					OAS	ANC	
1. Reinvestigat and 1b)			ie (sum o	f Items la			
				erdue in Item 3			
b. Rein	restigat:	ions becomi	ing due t	his month		•••••	
2, Reinvestigat				tems 2a 2b)			
				grant found to			
				grant change			
conti	nuance p	ions cancel prior to co	mpletion				
(Item 1 minu	is Item 2	2; also Ite	m 3a plu	of this month s 3b) ths or more	7.		
b. Reinv	restigati	lons overdu	which re	nan 12 months .	overdue	less than	12
Month-Year	OAS	ANB & APSB	ANC	Month-Year	OAS	ANB & APSB	ANC
Jan. 19 . Feb. 19 . Mar. 19 . April 19 . May 19 . June 19 .				July 19 Aug. 19 Sept. 19 Oct. 19 Nov. 19 Dec. 19			
SECTION C.						1	
4. Reinvestigat	ions com	OAS		niversary month			
		ANB	& APSB	· · · · · · <u> </u>	· · · · · · · · · · · · · · · · · · ·	-	
(Signature of pe	rson rep			••••	Title	**************************************	
Form DPA 10, Revised				ar i garanteen anna agus agus - 1900 a' cumaran a' dhainteen a' fhèil de gara - 17 mar an dhainteen ag san e a			

FILED
in the Office of the Secretary of State
of the State of California

2/21/50

FEB 20 1950

DEPARTMENT BULLETIN NO. 405 (OAS, ANB, APSB) (RROPOSED) At

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

FRANK M ORDAN, Secretary of State

Subject:

Old Age Security Permanent Sample Schedule, and Social Data Record Card - Aid to the Blind

Effective March 1, 1950, the following rules and regulations with respect to the Old Age Security Permanent Sample Schedule and the Social Data Record Card - Aid to the Blind shall apply:

Old Age Security Permanent Sample Schedule (Form Ag 251)

Manual of Policies and Procedures Sections 290-00 through 299-99, except sections 292-40 and 292-45, are readopted. Form ag 251, homember 1947 ar June 1948 is to be used.

Until further notice, entries in Item Q, Personal Property (Manual Section 292-40) and Item R, Life Insurance or Burial Trust, (Manual Section 292-45) shall be disregarded. In lieu thereof a copy of Form Temp 302 Ag, Old Age Security Eligibility Analysis, showing case name, number and county identification and with Section II, Personal Property, completed according to instructions contained in Department Bulletin No. 382, shall be submitted with each Form Ag 251.

Information on Real Property shall be reported in Item S on Form Ag 251, in accordance with Manual Section 292-50.

Social Data Record Card - Aid to the Blind, Form Bl 230 (ANB-APSB)

Manual of Policies and Procedures Sections 285-00 through 289-99, except 287-59 and 287-75, are readopted. In addition, the following is now required:

- 1. The portion of Form Bl 230 in the lower right hand corner, formerly identified with a double line and the notes "do not write below this line" and "to be completed by State Department" (deleted from the form in recent issues) shall be completed. Entries shall be as follows:
 - a) status of case: indicate whether the case is new or is being reinstated (note that Form Bl 230 is not required on "restored" cases);
 - b) amount of this grant: indicate the amount approved for the case (Item 12, Form Bl 201 March 1950);
 - c) other income: write in each source of income (other than the grant) and the amount received from each source (Item 6D, Form Bl 201 March 1950). If there is no income, write "none";

- d) total need: to the right of the space allotted to "other income" enter the total need computed for the recipient, e.g., "T.N. \$98". This figure can not be less than \$85;
- e) education and employment: the three items under this heading are self-explanatory.
- 2. Until further notice, entries in Items 21, Personal Property, and 22, Life Insurance, (Manual Sections 287-75 and 287-59) shall be disregarded. In lieu thereof a copy of Form Temp 302 Bl, Security for the Blind Eligibility Analysis, showing case name, number and county identification, and with Section II, Personal Property, completed according to instructions contained in Department Bulletin No. 385, shall be submitted with each Form Bl 230 on approved ANB and APSB cases.

Information on Real Property shall be reported in Item 23, Form Bl 230, as formerly (Manual Sections 287-60, 287-65 and 287-70).

Department Bulletin No. 342 is now obsolete.

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Signature) (Date)

MYRTLE WILLIAMS

hit 10 103, 103.5, 103.6, 2140,3075

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FILED

616 K STREET SACRAMENTO 14 February 21, 1950

in the Office of the Secretary of State of the State of California

DEPARTMENT BULLETIN NO.404 (OAS, ANB) (PROPOSED)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS DISTRICT OFFICES SDSW

FEB 20 1950

Subject: Utilization of Property as a Resource - OAS, ANB

The Social Security Administration's definition of a needy person requires that all real property owned by an applicant or recipient of OAS or ANB must be considered as a resource to be utilized in meeting his needs. Therefore, all real property owned by the applicant or recipient shall be considered a resource that must be used or developed toward meeting the needs of the individual, even though such real property falls within the \$3500 statutory maximum (county assessed value less all encumbrances of record).

The following provisions shall govern the utilization of real property owned by applicants and recipients. There is no requirement that the separate property of the spouse be utilized to meet the needs of the applicant or recipient, even though in OAS such property must be considered in determining eligibility of the applicant or recipient. Neither do these provisions apply to property in which the individual has only a partial interest and of which he lacks full control. When the property is owned with another person or persons, effort shall be made to utilize the individual's share as a resource for him, but it is realized that the outcome of such effort will be determined by the terms of the joint ownership and the desires of the other owners.

A. Real Property Currently Being Used to Meet Needs

Any real property which is used as a home by the applicant or recipient during all or a portion of the year provides shelter and therefore is being used as a resource toward meeting his needs. Any income that may accrue from such property, such as occupancy value or net income from the rental of any portion of the home, also constitutes a resource to be utilized in meeting the individual's needs. Real property normally used as a home by the individual, but which is currently not being so used because of illness or temporary absence, shall be construed as the individual's home. The following situations shall be considered as coming within the definition of real property used as a home:

1. Multiple Dwelling Property - If the real property consists of a multiple dwelling, one unit of which is used by the individual as his home;

- 2. Rental Property on Same Lot If the real property consists of the individual's home and a separate rental unit (or units) is located on the same lot:
- Home and Adjacent Land If the real property consists of the individual's home and land immediately adjacent to it.

In situations 1, 2 and 3 above effort shall be made to utilize that portion or portions of the home property, not occupied by the applicant or recipient, toward meeting his needs.

If property not used as a home is producing a reasonable income, the property constitutes a resource which is being utilized in meeting the individual's needs. Any decision as to the adequacy of the return from the property shall be based on the long-time income pattern of the property. For instance, if the property is productive agricultural holdings, the evaluation of its productivity shall not be based on the returns for the current year only. An individual should not be expected to sell a piece of property because it yielded little or no net income during a given year. Any decision as to the retention of real property with a fluctuating net income shall be based on the average income over a period of at least five years.

Real Property Used as a Reserve

If the net assessed value of real property other than the home, when added to the market value of all personal property owned, does not exceed \$1500, such real property may be retained in order to permit the individual to possess reserves with which to meet the common contingencies of life, provided total real property holdings are within the statutory maximum. (See Department Bullin no. 402)

Other Real Property

If an individual owns real property other than that included in A and B above, it is required that he attempt to utilize such property as a resource to help meet his needs. As long as the individual maintains a sustained effort to utilize his real property as a resource to help meet his needs, the ownership of such property shall not in itself render him ineligible, provided his total real property holdings are within the statutory maximum.

One method of utilizing such property would be to rent it; another would be to sell it. The question of the advisability of selling property should be weighed against the current income it produces and can be made to produce regularly by careful repair and management.

The continuous listing of such property for rental or sale shall be considered as constituting a sustained effort to utilize the property as a resource. In no instance shall the individual be required to sell such property at less than its current market value, or rent it at less than the normal rental value for similar property in the community. The current sale or rental value of such property shall be determined by obtaining estimates from realtors or others in a position to know the value of the property.

The listing of such property for sale or rental at a value in excess of the realistic value for similar property in the community shall not be construed as a bona fide effort to utilize such property as a resource.

The county shall interpret the provisions of the foregoing policy to the applicant or recipient so that he may fully understand how the proceeds from the use, sale or rental of the real property can be utilized toward meeting his needs. The applicant or recipient makes the decision as to the way the resource is to be used or developed. The case record, in each instance, shall indicate the decision made.

It will be necessary to review all current cases in which the recipient possesses real property not occupied as a home in which he lives. Such review shall be made not later than the next annual reinvestigation.

Provisions of the Manual of Policies and Procedures in conflict with the regulations in this bulletin are hereby superseded.

Certified as a Regulation (or Regulations) of the

(Name of State Agency)
(Name of State Agency)
Mytle Cyceum (Signature)
(Signature)
Diesta
(Title)
2-17-50
(Date)

1.×10 103, 103.5, 2140

MYRTLE WILLIAMS

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 February 1, 1950

FILED

in the Office of the Secretary of State
of the State of California

FEB 20 1950

DEPARTMENT BULLETIN NO. 403 (OAS)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS
DISTRICT OFFICES SDSW

By Many and Deputy

FRANK M. JORDAN, Secretary of State

Subject: Completion of Form Temp. 302 Ag

In view of the new regulations regarding property holdings contained in Department Bulletin No. 402 it will not be necessary to continue preparation of Forms Temp. 302 Ag (Old Age Security Eligibility Analysis) at this time except on OAS Permanent Sample cases, as required by Department Bulletin No. 396.

One copy of a fully completed worksheet (Form Temp. 302 Ag) for each OAS Permanent Sample case (case-number endings, 22, 44, 66 and 88) shall be transmitted to the Bureau of Research and Statistics, Sacramento, not later than February 6.

All other worksheets now fully or partially completed shall be retained for possible use at a later date.

The department's need for these data on the sample cases continues to be of the utmost urgency.

Certified as a Regulation (or Regulations) of the

(Date)

WYIC 103, 103.5, 103.6 2140, 3075

FILED

in the Office of the Secretary of State of the State of California

2/20/20

DEPARTMENT BULLETIN NO.388

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS DISTRICT OFFICES SDSW

FEB 20 1950

FRANK M. JORDAN, Secretary of State

Subject:

Authorizing and Issuing Retroactive OAS and ANB Payments for Months Prior to March 1950

According to Attorney General's Opinion No. 49/254 payments authorized on and after March 1, 1950, for months prior to March 1950 must be authorized by the director of the State Department of Social Welfare or his deputy rather than by the county board of supervisors.

On March 1, 1950, or as soon thereafter as possible the director of the State Department of Social Welfare, with the approval of the Social Welfare Board, will appoint the county welfare director as a deputy director of the State Department of Social Welfare empowering the welfare director to authorize retroactive payments for months prior to March 1, 1950.

The State Controller has stated that his office will contact the counties of Alameda, Los Angeles, Monterey, San Beniot, San Francisco, Santa Clara and Santa Cruz for the purpose of contracting with those counties for disbursement by the county auditor of retroactive OAS and ANB payments for months prior to March 1, 1950, authorized on or after March 1, 1950. Such retroactive payments for the 51 other counties will be disbursed by the State Controller.

The method of authorizing and disbursing retroactive payments on an after March 1, 1950, for months prior to March 1950 will differ, depending upon whether payments are to be disbursed by the county auditor under contract with the State Controller or the warrants are to be disbursed by the State Controller. The following procedure shall govern:

Disbursement of Payments for Months Prior to March 1950 by the County Auditor (Alameda, Los Angeles, Monterey, San Benito, San Francisco, Santa Clara and Santa Cruz Counties)

I. Payments on New Applications

If the beginning date of aid (as determined under Code Sections 2183, 2183.9 and 3082) is prior to March 1, 1950, two authorizations are necessary as follows:

The action of the deputy director, State Department of Social Welfare, granting aid for months prior to March 1950 shall be made on Form Temp 201 A, and submitted to the county auditor for payment.

(2) The actic for the board of supervisors graing goald for March 1950 and subsequent months shall be reported on Form Ag, Bl 201 completed in the usual manner, and showing the action of the board of supervisors in Section 16 of Ag 201 and Section 12 of Bl 201. The earliest effective date to be shown on the Ag, Bl 201 is March 1, 1950.

A copy of the Form Temp 201 A shall be stapled to the copy of the Form Ag, Bl 201 which is transmitted to the State Department of Social Welfare.

Form Temp 201 A, and Form Temp 232 A referred to in Section II below, are to be requisitioned from the State Department of Social Welfare, 616 K Street, Sacramento, or they may be reproduced locally.

Note: See Section D re pending OAS applications signed by persons under 65 years of age.

II. Payments on Continuing Cases

(a) Underpayment in January and/or February 1950.

Retroactive aid shall be paid when a payment was made in conformity with the authorized award and it is subsequently determined that the recipient was eligible to a larger grant, provided it is possible to authorize the additional amount before the end of the second month following that in which the recipient was underpaid. (Manual Section 361-25, Item 11.) Therefore in March 1950 it may become necessary for the deputy director, State Department of Social Welfare, to grant additional aid for January and/or February. In April it may become necessary for the deputy director, State Department of Social Welfare, to grant additional aid for February.

The action of the deputy director, State Department of Social Welfare, granting additional aid for January and/or February shall be reported on Form Temp 232 A.

Note: Any increase in the grant for March 1950 or thereafter shall be authorized by the board of supervisors and reported on Form Ag 232, Notice of Change, in the usual manner.

(b) Suspended Payments

The deputy director, State Department of Social Welfare, shall take all necessary action in relation to held (suspended) payments for January and February, i.e., advises the auditor to release or cancel a suspended January or February warrant in accord with the usual procedure followed by the county. If a suspended warrant is to be cancelled and reissued in a different amount, the deputy director, State Department of Social Welfare, shall authorize the amount to be paid for the particular month on Form Temp 232 A. (A warrant issued to replace a suspended cancelled warrant must be delivered before the end of the second month following that for which the retroactive payment is made.)

III. Other Payments

(a) Erroneous Denials

If an application was erroneously denied prior to March 1, 1950, and that action is rescinded by the deputy director, State Department of Social Welfare, on or after March 1, 1950, as provided in Manual

Section 361-25, Item 9a, the aid which is granted for months prior to March 1950 shall be authorized by the deputy director; aid for March 1950 or thereafter must be granted by the board of supervisors. The same procedure as outlined in Section A, I of this bulletin governs.

(b) Erroneous Discontinuances

If erroneous discontinuance occurred prior to March 1950; and such action is rescinded by the deputy director, State Department of Social Welfare within one year from the date of the erroneous action (see Manual Section 361-25, Item 9b), the aid granted for months prior to March 1950 shall be authorized by the deputy director, State Department of Social Welfare, and reported on Form Temp 232 A. Aid for March 1950 or subsequent months shall be authorized by the board of supervisors in the usual manner.

(c) Appeals

Payment of aid granted upon appeal by the Social Welfare Board, or as the result of a stipulated appeal, for months prior to March 1950, shall be authorized by the deputy director, State Department of Social Welfare, on appropriate Form Temp 201 A or Temp 232 A. Payments for March 1950 and subsequent months shall be authorized by the board of supervisors in the usual manner.

Since federal participation in retroactive aid for appeal cases is governed by the date the appeal was signed the State Department of Social Welfare, when notifying the county of the appeal decision, will specify the date from which federal participation shall be claimed.

B. Disbursement of Payment for Months Prior to March 1950 by State Controller (All counties except those named in Section A)

I. Payments on New Applications

If the beginning date of aid (as determined under Code Sections 2183, 2183.9 and 3082) is <u>prior</u> to March 1, 1950, two authorizations are necessary as follows:

- (1) The payment for March 1950 and subsequent months shall be authorized by the board of supervisors and that action shall be reported on Form Ag, Bl 201 in the usual manner. The earliest effective date to be shown on the Ag 201 is March 1, 1950.
- (2) The payments for months prior to March 1950 shall be authorized by the deputy director, State Department of Social Welfare, on Form Ag, Bl 278, Authorization to Pay or Discontinue OAS (SB). See Section C for method of completing and transmitting Form Ag, Bl 278.

Note: See Section D re Pending OAS Applications signed by persons under 65 years of age.

II. Payments on Continuing Cases

(a) Underpayments in January and/or February.

Retroactive aid shall be paid when a payment was in conformity with the authorized award and it is subsequently determined that the recipient was eligible to a larger grant provided it is possible to authorize the additional amount before the end of the second calendar month following that in which the recipient was underpaid (Manual Section 361-25, Item 11). Therefore in March 1950 it may be necessary for the deputy director, State Department of Social Welfare, to grant additional aid for January and/or February. In April it may be necessary for the deputy director, State Department of Social Welfare, to grant additional aid for February. The action of the deputy director, State Department of Social Welfare, granting additional aid for January and/or February shall be recorded on Form Ag, Bl 278. (See Section C for method of completing and transmitting Form Ag, Bl 278.)

Note: Any retroactive (or supplemental) increase in the grant for March or thereafter shall be authorized by the board of supervisors and reported on Form Ag, Bl 232, Notice of Change, in the usual manner.

(b) Suspended Payments

At the termination of State Department of Social Welfare regional office operations held (suspended) warrants for the months of January and February will be cancelled. If it is subsequently determined that the recipient was eligible to receive payment for a month for which a "held" warrant was cancelled the issuance of a new warrant in the same or a different amount shall be authorized on Form Ag 278 provided payment can be delivered before the end of the suspension period (i.e., mailed on or before the last day of the second month following the month for which payment was withheld.)

In March, therefore, it may be necessary for the deputy director to authorize the issuance of a payment for January and/or February. Likewise, if the only warrant which was held and cancelled was for the month of February, it may be necessary to authorize the issuance of a payment for February 1950 in March or not later than April.

The deputy director, State Department of Social Welfare, shall authorize the issuance of held (suspended) warrants for months prior to March 1950 on Form Ag, Bl 278. (See Section C for method of completing and transmitting Form Ag, Bl 278.)

III. Other Payments

(a) Erroneous Denials

If an applicant was erroneously denied prior to March 1, 1950, and that action is rescinded by the deputy director, State Department of Social Welfare, on or after March 1, 1950, as provided in Manual Section 361-25, Item 9a, the aid which is granted for months prior to March 1950 shall be authorized by the deputy director; aid for March 1950 or thereafter must be granted by the board of supervisors. The same procedure as outlined in Section B, I of this bulletin governs.

(b) Erroneous Discontinuances

If erroneous discontinuance occurred prior to March 1950, but such action is rescinded by the deputy director, State Department of Social Welfare, within one year from the date of the erroneous action, (see Manual Section 361-25, Item 9b), aid which is granted for months prior to March 1950 shall be authorized by the deputy director, State Department of Social Welfare, on Form Ag, Bl 278. (See Section C for method of completing and transmitting Form Ag, Bl 278.)

Payment for March 1950 and subsequent months shall be authorized by the board of supervisors and that action shall be reported on Form Ag, Bl 232, Notice of Change, in the usual manner.

(c) Appeals

Payment of aid granted upon appeal by the Social Welfare Board, or as the result of a stipulated appeal, for months prior to March 1950 shall be authorized by the deputy director, State Department of Social Welfare, on Form Ag, Bl 278. Payment for March 1950 and subsequent months shall be authorized by the board of supervisors in the usual manner.

Since federal participation in retroactive aid on appeal cases is governed by the date the appeal was signed the State Department of Social Welfare, when notifying the county of the appeal decision, will specify the date from which federal participation shall be claimed.

C. Preparation and Flow of Form Ag, Bl 278 Authorizing Payment for Months Prior to March 1, 1950 (Applies only when payments for months prior to March 1950 are made by the State Controller.)

I. Preparation

Form Ag, Bl 278 shall be prepared in <u>quadruplicate</u> and must be typed. The form shall be used only for payments for months <u>prior</u> to March 1, 1950. The following instructions govern the completion of the numbered items on the form.

- 1. Date Enter the date on which the worker completed the longhand copy of the form from which the typed copy is prepared.
- 2. <u>Document Number</u> Do not fill in until the typed form has been signed by the deputy director, State Department of Social Welfare, and the form is ready to transmit. (See Section III.)
- 3. State Case Number Make no entry to the left of the vertical line. Show the state number to the right of the vertical line. It is not necessary to insert enough zeros in front of the case number to fill up six spaces.
- 4. <u>Insert the Name of the County</u> This together with the case number in Item 3 identifies the case.
- 5. Enter the given name first (and middle initial if known) then the surname.

- 6. Address Enter the full address except it is not necessary to record the state unless the recipient is living out of the state.
- 7. Type Disregard Items 7A, B, C and D.

Computation of Grant for Months Specified Below

All entries shall be made in Columns 1, 2, 3 and 4 as needed. Use a separate column for each month for which payment is to be made. Make no entries in Columns 5, 6 and 7.

- 8. Effective month, day and year If payment is to be made for a full month enter the first day of the particular month, i.e., 2/1/50. If payment is to be made for a partial month show the specific day in the month on which aid is to begin, i.e., if an applicant is to be paid for February but residence evidence establishes that the necessary period of residence was not acquired until 2/8, enter 2/8/50.
- 9. Total Need Leave blank.
- 10. Total Income Leave blank.
- 11. Need minus income Leave blank.
- 12. Entitled to Receive @ Rate of Always enter the amount the recipient would receive if eligible for a <u>full</u> month even though he may be eligible for a partial payment for the particular month.
- 13. Amount Previously Authorized Enter "O" if the person has received no payment for the specific month as in the case of a new application, and when payment is authorized for a month for which a held (suspended) warrant was cancelled, etc.

If a retroactive supplemental payment is being authorized for a month for which payment has already been made in some amount, enter the amount the recipient has already received for the particular month, i.e., if the recipient received \$65 in January and in March \$10 additional aid is being authorized for January, enter \$65 on line 13.

14. Amount to be Paid - Enter the amount of the warrant to be paid for the particular month. If the person is eligible for the full month and has not previously received a payment for the particular month the amount entered in Item 14 will be identical with the amount entered for Item 12.

If a retroactive supplemental payment is being authorized for a month for which payment has already been made in some amount, enter the additional amount to be paid, i.e., if the recipient received \$65 in January and \$10 additional aid is now being authorized for January, enter \$10 on Line 14.

If the person is eligible for a partial month payment, enter the prorated amount he is to receive for the month. Example: If aid is being granted for February, but only for 15 days in February, the amount entered in Item 14 is 15/28 of the amount shown in Item 12.

- 15, 15A, 15B, 16 (Relating to Federal participation.)
 - (a) New Applications

There is no federal participation in retroactive initial payments. The state pays the entire grant. Thus if an application is granted in March, but the beginning date of aid is 1/1/50, these items in the column used to show the payment for January, and in the column used to show the payment for February, will be completed as follows:

- 15 Total federal excess 0

 15A Excess on previous payment 0
 - 15B Excess on this payment 0
- 16 Ineligible federal participation Since the state pays the entire amount, enter the identical amount as shown in Item 14.
- (b) Payment for month for which a held (suspended) warrant was cancelled. There is federal participation in the payment which must be delivered before the end of the second month following that for which a warrant was held (suspended).

Suppose payment of \$65 is being authorized to replace a cancelled February warrant. This amount will have been recorded in Item 14 (and Item 12). Items 15 through 16 will be completed as follows:

- 15 Total federal excess \$15 (The amount by which the payment exceeds \$50)

15B Excess on this payment .. 15

16 - Ineligible federal participation

("O" entered in Item 16 means the state will not pay the full amount of the payment because federal participation will be received.

Exception: There is no federal participation in a warrant being reissued to replace a cancelled suspended warrant for an OAS recipient who had not reached the 65th birthday during the month for which the warrant is being authorized.

Department Bulletin No. Page 7

Under such circumstance enter "O" for Items 15, 15A and 15B; the amount entered for Item 16 is the identical amount entered for Item 14.

- (c) Retroactive supplemental payments, i.e., the recipient has already received payment in some amount for January and/or February, but is entitled to an additional payment for either or both months.
 - 15 Total federal excess. Enter the amount by which the total payment for the month (the sum of the payment already received, and the additional payment being authorized) exceeds \$50.
 - 15A- Enter the amount by which the payment already received exceeded \$50. If the payment already received was exactly \$50 or a lesser amount, enter "O".
 - 15B- Enter the figure which is the difference between Item 15 and 15A.
 - 16 Enter "O" because "O" is <u>always</u> entered when there is any federal participation in the payment for the month.

 (When there is no federal participation in the payment for the month, the amount entered for Item 16 is <u>always</u> identical with the amount shown in Item 14.)
- (d) Payments Resulting From Recission of an Erroneous Denial or Discontinuance

There is federal participation (provided the person had reached the age of 65 years) in the payment authorized for either or both of the two months prior to the month in which an erroneous denial or discontinuance action was rescinded. (See Manual Section 627-30, Items 2 and 7.) Under such circumstance complete the items in the appropriate column as follows:

- 15 Total federal excess enter the amount by which the payment exceeds \$50
- 15A- Excess on previous payment "O"
- 15B- Excess on this payment enter same figure as for Item 15.
- 16 Ineligible Federal Participation enter "O"
- 17. Additional Person to Payroll

There is never a check in more than one box in Item 17.

Box "O" - Always check here when the payment is a supplemental payment for a month for which the recipient has already received payment in some amount. This is the only circumstance under which the "O" box is ever checked.

- Box "l" Since there is no federal participation in retroactive payments on new applications the box will be checked only when a warrant is being authorized for a month for which a held (suspended) warrant was cancelled or when payment is authorized for either or both of the two months prior to a month in which an erroneous denial or discontinuance action was rescinded (provided, in OAS, the person had reached the age of 65 years).
- Box "2" Check here for all payments for months prior to March 1, 1950, on new applications.
- 18. Leave blank.
- 19. Leave blank.
- 20. Leave blank.
- 21. Leave blank.
- 22. Leave blank.
- 23. Check Item A.
- 24. Signature of deputy director, State Department of Social Welfare, and insert date signature is affixed.

II. Flow of Form Ag 278

One copy of Ag, Bl 278 shall be filed in the case record. One copy shall be forwarded to the State Department of Social Welfare. For new applications this copy shall be attached to the Ag, Bl 201 reporting authorization by the board of supervisors for payments for March 1950 and subsequent months.

The original and one copy of the Ag, Bl 278 (with no supporting documents) shall be transmitted, after the document number is entered in Item 2 (see Section III), to the Central Scheduling Unit, State Department of Social Welfare, 910 9th Street, Sacramento.

The original copy will be transmitted by the Central Scheduling Unit to the State Controller and all disbursements will be made through his office at 1400 I Street, Sacramento.

The State Controller will furnish each county, and the Central Scheduling Unit, with copies of Warrant Registers (Form CD 12) evidencing payment as authorized on Form Ag, Bl 278 scheduled to him. Insofar as counties are concerned these forms are informational only and are not to be reflected in any way in claims or aid affidavit (Form Ag, Bl 800) submitted to the State Department of Social Welfare.

Any question relating to non-receipt of warrants authorized on Ag, Bl 278 by recipients should be directed to the Central Scheduling Unit, 910 9th Street, Sacramento. When making inquiry, specify the state number, the name, and the document number assigned to the Ag, Bl 278 transmitted to the Central Scheduling Unit.

III. Document Numbers

Counties shall enter document Number 1 on all copies of the first Form Ag, Bl 278 transmitted to the Central Scheduling Unit, and shall assign successive numbers to documents subsequently forwarded. A record of documents forwarded to the Central Scheduling Unit must be maintained in the county office on Form Gen 109, "Register of Action Documents." Each group of Ag, Bl 278's forwarded to the Scheduling Unit must be transmitted with Form Gen 114, "Transmittal of Documents."

Complete instructions for use of the Document Register were included in Regional Social Service Instruction No. 10. Only those persons responsible for the actual function of transmitting documents to the Central Scheduling Unit will be concerned with those instructions. Two copies of that portion of Regional Social Service Instruction No. 10 relating to the Document Register are being forwarded to county welfare directors under separate cover.

IV. Supply of Forms

A supply of Forms Ag, Bl 278, Form Gen 109 and Form Gen 114 may be procured prior to 3/1/50 from the nearest district or regional office, or by requisition to the Central Office at 616 K Street, Sacramento.

D. Oas Pending Applications for Persons Under 65 Years of Age

Included in the pending applications transferred to the county on March 1, 1950, may be some applications filed under the provisions of Article XXV by persons under 65 years of age. The sixty-day investigation period on such applications signed on or before December 2, 1949, ended not later than January 31, 1950. Although such persons may not have reached the 65th birth date by March 1, 1950, investigation of eligibility shall be completed and, if otherwise eligible, the applicant shall be paid the security due, from the first of the month following the end of the sixty-day period through February 28, 1950.

If the application signed by a person under 65 years of age was filed on December 3, 1949, or thereafter such application shall be denied unless

- (1) age 65 has been reached since the application was signed.
- (2) the application is within sixty days of reaching the 65th birth date.

Under either circumstance investigation shall be completed and if eligible aid shall be granted as provided in W&I Code Section 2183, except that in no case may the effective date be prior to the date age 65 is reached.

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CERTIFICATE OF VERIFICATION OF ENGLISHLITY FOR PAYMENT FOR MONTHS PRIOR TO MARCH 1950

New Application Erroneous Denial Rescinded Date of Erroneous Deni			OAS	Check appropriate box
Applicant's Nam	е		State	Number
Address			County	Number
I certify that the evidence is on file in the state and federal represent the above named is entitled	case record, is operatives, and that to	en to inspect	ion by duly	authorized ge and belief
column 4.	0100.			
column 4.	2	3	4	5
			4 Monthly Rate	5 Amount to be Paid
1	2 Total Need	3 Total Income	Monthly Rate	Amount to be Paid
Effective Month, Day, and Year	Total Need Pecified in column	Total Income five (5) for	Monthly Rate	Amount to be Paid
Effective Month, Day, and Year Aid in the amount s	Total Need Pecified in column	Total Income five (5) for	Monthly Rate	Amount to be Paid
Aid in the amount s	Total Need Pecified in column	Total Income five (5) for	Monthly Rate	Amount to be Paid

PAYMENTS (OTHER THAN INITIAL PAYMENTS) FOR MONTHS PRIOR TO MARCH 1950

1.	Supplemental Payment		Check	OAS		Check appropriate
2.	Suspended Payment		appropriate	ANB		pox
3.	Erroneous Discontinuance rescinded		box			
	Date of Erroneous Discontinuan	ice				
	Applicants Name			State	Numbe	er
	Address			County	Numbe	er

I certify that the fact of eligibility has been established, that supporting evidence is on file in the case record, is open to inspection by duly authorized state and federal representatives, and that to the best of my knowledge and belief the above named is entitled to payment of Old Age Security/Aid to Needy Blind as designated in column six (6) below:

2	3	4	5	6	
Total Need	Amount of Income	Eligible to Receive	Amount Paid	Additional Amount Due	
• • • • • • • • • • • • • • • • • • • •					
				+	
	Z Total Need				

Aid in the amount specified in column six (6) for the specified month (s) is authorized, such payment (s) being a proper charge against the appropriation made by Article XXV.

Deputy Director	SDSW	Date	

^{1.} Supplemental Payment - Check here when an additional payment is being authorized for a month prior to March 1950 and for which the recipient has already received a payment in some amount.

^{2.} Suspended Payment - Check here when the payment being authorized is for a month prior to March 1950 and for which a payment was held (suspended) and cancelled,

^{3.} Erroneous Discontinuance Rescinded - Check here when payments for months prior to March 1950 are being authorized to correct an erroneous discontinuance.

AUTHORIZATIC TO PAY OR DISCONTINUE OLD AGE SECURITY

1. Da	TE			3. ST.	ATE CASE NU	JMBER	
2. Do	CUMENT N	Number		4. Co	DUNTY		
5. Name							
	e is a guardian of	the estate enter th	ne guardian's nam	e first; i.e., John	Doe Gdn. of Richard	Roe	
6. Address Street		ner and then any time with the last last and any and any had had the said date.			City		Zone
7. Type A. New or reappl	ication If tra	nsfer, show form	er State No.		<u> </u>		2011
				A	Make 1	o entry in Col	umn 5.
One C. Grant change-					'Alway	s complete Col	umnes and 6
D. Discontinuance						ete Column 5	
			1		Compi	ete Column) (omy
COMPUTATION OF GRANT FOR MONTHS SPECIFIED BELOW:	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COLUMN 7
	RETE	ROACTIVE O	R SUPPLEM	ENTAL	CHANGE AUTHORIZATION	NEW	CONTROLLER'S
	MONTH DAY/YEAR	MONTH DAY/YEAR	MONTH DAY/YEAR	MONTH DAY/YEAR	TO AMOUNT IN	AUTHORIZATION	USE ONLY
8. Effective—month, day, year					COLUMN 6		
9. Total need	\$	\$	\$	\$	XXXXXX	\$	
10. Total income (See Item 19)	\$	\$	\$	\$	XXXXXX	\$	
11. Need minus income	\$	\$	\$	\$	XXXXXX	\$	
12. Entitled to receive @ rate of	\$	\$	\$	\$	XXXXXX	\$	
13. Amount previously authorized	\$	\$	\$	\$	\$	XXXXXX	
14. Amount to be paid	s	\$	\$	\$	××××××	\$	\$
15. Total federal excess	\$	\$	\$	\$	\$	\$	\$
15A. Excess on previous payment	\$	\$	\$	\$	×××××	××××××	
15B. Excess on this payment	\$	\$	\$	\$	×××××	×××××	
16. Ineligible federal participation	\$	\$	\$	\$	\$	\$	\$
17. Additional person to payroll 0. No addition	0. 🗆	0. 🗆	0. 🗆	0. 🗆			۰ 🗆
Additional person	".		0.				0.
 Eligible federal Ineligible federal 	1. 🗆	1. 2.	1. 🗆	1. 🗆	1. 🗆	1. 🗆	1. 🗆
18. Month and year when age 65			2. ()		2. []		2. 🗆
will be reached (for persons 63 or 64)							
19. INCOME—Record each AMOU	NIT of income		SOURCE	MONTH	1:1		
17. IIICOME—Record each AMOU	14 1 of income	received, its	SOURCE and	MONTH	which received		
20. IF RESTORED AFTER RELE	ASE FROM	PUBLIC INS	STITUTION,	STATE DA	ATE OF RELEA	SE	
21. If restored following discontinuar	nce because of	employment.	enter date of	written reque	st for restoration		
and check one: Eligibility es							
22. CORRECTION OR CHANGE	IN PAYEE	NAME					
Name on line 5 is servered on al							
Name on line 5 is corrected or cl	anged from				shown on line 5 of previo	us authorization	
23. CERTIFICATION:							
I certify the above facts l	nave been verif	ied by investi	gation, that su	pporting evic	dence is on file in	the case record an	d (check appro
priate box)							
(A) The above-named person is							
(B) The investigation of eligibil in accord with Section 218	3.9 of the We	complete but of lfare and Inst	conditional res	storation of C	OAS in the above-	specified amount	is authorized
(C) The above payments are aut							
(D) Payment beyond the effecti	ve date stated	above is no lo	onger authoriz	ed			
Authorized S	iensture					Date	-
Authorized 3		RESER	EVE FOR ST	TATE			
Review	Date		Audit			Date	
FORM AG-278 (REV. JULY, 1949)		(INSTRUCTI	ONS ON REV	ERSE SIDE)			

INSTRUCTIONS

Self-Explanatory Items Are Not Included in These Instructions

- 1. Date—Enter here the date the form is made out by the case worker.
- 2. Document Number—To be entered by a clerk in the district office. Enter here the next consecutive number from the Register of Action Documents. Do not enter this number until the form has been signed by the Deputy Director, State Department of Social Welfare, and the form is ready for transmittal to the Regional Office.
- 3. Case Number—The region and district number precede the number assigned to the case. Enter region number in first space, and district number in second and third spaces preceding the vertical line. If the district number is smaller than 10 enter region number in first space, "0" in second space and the district number in the third space; i.e., for Region 9, district 2 enter 9 0 2 |. The case number is entered to the right of the vertical line. When the case number has less than 6 digits, enter the number as far to the right as possible; i.e., | 1 2 0 7.
- 5. Name—Enter the given name first, then the surname.
- 6. Address—If in the absence of a street address there is a P.O. Box No., RFD Route, or General Delivery designation, such designation precedes the name of the city or town. If a guardian is shown for Item 5, give address of guardian.
- 8. Enter the effective date of each grant in each column completed.
- 9. Total Need—Enter the total amount of need computed for each monthly entry; e.g., Total Need shown on Form Temp. 158.
- 10. Total Income—Enter the total amount of net income received by the recipient for each month for which an entry is made in Columns 1-4, and to be received in the month entered in Column 6; e.g., total Net Income as shown on Form Temp. 158. (See Item 19)
- 12. Entitled to Receive @ Rate of—Enter the monthly rate; i.e., the amount the applicant or recipient is entitled to receive for a full month. This cannot exceed \$75. If need is in excess of \$75 (Item 9) the amount shown in Item 11 is raised to the next higher whole dollar, provided it does not exceed \$75.
- 13. Amount Previously Authorized—The entry in this item for Columns 1-4 will be zero for all except supplemental payments. This item will be completed in Column 5 only on changes in grants on the continuing payroll (Master Deck), and discontinuances, and the amount entered is the amount shown for this item in Column 6 of the last authorization transmitted.
- 14.* Amount to be Paid—Enter the difference between Item 12 and 13 (12 minus 13). This amount will be equal to Item 12 for all case situations except supplemental payments and payments made to cover less than a full month for new, reapplications, or restorations. (In Column 6, the amount entered for Items 12 and 14 are identical.)
- 15.*Total Federal Excess—Enter the total amount reported in Item 12 that exceeds the Federal matching base; e.g., for an amount of \$75 reported in Item 12, the total excess would be \$25. If no Federal funds are available for the payment this item should be reported as zero.
- 15A.*Excess on Previous Payment—The entry in this item will be zero for all cases except supplemental payments. For supplemental payments, this entry will be the excess reported on the last authorization on file affecting the month specified in Columns 1-4; e.g., a case for which \$65 was authorized (Item 13) and now is to receive a supplemental payment of \$10 (Item 14) the total excess (Item 15) is \$25, the entry in this item (15A) would be \$15.
- 15B.*Excess on This Payment—Item 15 minus Item 15A.
- 16.*Ineligible to Federal Participation—This item will be zero for all cases for which any Federal reimbursement is available. For all cases for which Federal reimbursement is not available, entries in this item will agree with the entry in Item 14 for Columns 1-4; Item 13 for Column 5; and Item 12 (and 14) for Column 6.
- 17.*Addition of Person to Payroll—Check the appropriate box for each column in which an entry is made. Check 0 for all supplemental payments. For all other case situations, check either 1 or 2. If Federal funds are to be claimed for a monthly payment, check 1. Check Item 2 only if no Federal reimbursement is available for the payment.
- 18. Month and Year When Age 65 Will Be Reached (for Persons 63 or 64)—Enter the month and year the recipient named in Item 5, if he is now less than 65, will become 65 according to the age evidence. If this date is within the period covered by entries in Columns 1 to 6, enter in appropriate month, if not enter date in Column 6 only.
- 19. Income—Record Each Amount of Income Received, Its Source and Month in Which Received; e.g., OASI \$25 beginning January, 1949
 Rent from Real Property—February \$10—March \$10
- 22. Correction or Change in Payee Name—If the name shown on Item 5 of the last authorization transmitted is incorrect or is to be changed because of marriage, or termination or change in guardianship, show corrected name in Item 5 of this authorization and in Item 22 show name as reported on line 5 of the last authorization transmitted. Also complete Columns 5 and 6.

* Usually this item will be completed by clerical scaff.

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AUTHORIZATION TO PAY OR DISCONTINUE SECURITY FOR THE BLIND

				J. J.	THE CHIEF THE	MBER	
2. Doc	CUMENT N	Number		4. Co	UNTY	 	
. Name							
If there is	s a guardian of	he estate enter the	e guardian's name	first; i.e., John I	Doe Gdn. of Richard	Roe	
Street					City		Zone
TYPE A. New or reapplic	ation If tra	sefer show former	r State No		(1)		20
Check B. Restoration .	ation in trai	ister, snow tornier	State No.		Make n	o entry in Colu	mn 5.
One						1. 61	. 1.
C. Grant change—					=	complete Colu	
D. Discontinuance,	effective_				Comple	ete Column 5 o	nly
COMPUTATION OF GRANT FOR MONTHS SPECIFIED BELOW:	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COLUMN 7
	RETI	ROACTIVE OF	R SUPPLEM	ENTAL	CHANGE AUTHORIZATION	NEW	CONTROLLER'S
	MONTH DAY/YEAR	MONTH .	MONTH DAY/YEAR	MONTH DAY/YEAR	TO AMOUNT IN	AUTHORIZATION	USE ONLY
8. Effective—month, day, year					COLUMN 6		
9. Total need	\$	s	\$	\$		\$	
0. Total income (See Item 19)	\$	\$	\$	\$	××××××	\$	
Need minus income	\$	\$	\$	\$	××××××	s	
2. Entitled to receive @ rate of	\$	\$	\$	\$	XXXXXX	CANADA CA	
3. Amount previously authorized	\$	\$	\$	\$	\$	****	
4. Amount to be paid	\$	\$	\$	\$	* ***	***************************************	\$
5. Total federal excess	\$	s	\$	\$	\$	\$	\$
15A. Excess on previous payment	\$	\$	\$	\$	×××××	××××××	
15B. Excess on this payment	\$	\$	\$	\$	XXXXXX	XXXXXX	
6. Ineligible federal participation	\$	\$	s	\$	\$	\$	\$
7. Additional person to payroll	Signature of the second	Barrer Parker					
0. No addition	0.	0. 🗆	0.	0. 🗆			0.
Additional person	1. 🗆	1.	1. 🗆	1. 🗆	1. 🗆	1. 🗆	1.
1. Eligible federal							
Eligible federal Ineligible federal INCOME—Record each AMOUNT	2.	2. 🗆	2.	2.	2. 🗆	2.	2.
2. Ineligible federal 29. INCOME—Record each AMOUNT 20. IF RESTORED AFTER RELEA	2. NT of incom	e received, its	SOURCE and	d MONTH is	2. n which received		
	2. NT of incom	e received, its PUBLIC IN	SOURCE and	2. D	2. n which received	ASE	
2. Ineligible federal 9. INCOME—Record each AMOUR 0. IF RESTORED AFTER RELEA 2. CORRECTION OR CHANGE Name on line 5 is corrected or cha	ASE FROM IN PAYEE	e received, its PUBLIC IN	SOURCE and	STATE DA	ate of Release	ASE	
2. Ineligible federal 9. INCOME—Record each AMOUN 10. IF RESTORED AFTER RELEA 2. CORRECTION OR CHANGE Name on line 5 is corrected or change 3. CERTIFICATION: I certify the above facts ha	ASE FROM IN PAYEE anged from	e received, its PUBLIC IN: NAME fied by investi	SOURCE and STITUTION	STATE Da	2. n which received ATE OF RELEA	ASE	d (check appr
2. Ineligible federal 9. INCOME—Record each AMOUR 10. IF RESTORED AFTER RELEA 12. CORRECTION OR CHANGE Name on line 5 is corrected or cha 3. CERTIFICATION: I certify the above facts ha priate box)	ASE FROM IN PAYEE anged from	e received, its PUBLIC IN NAME fied by investi	STITUTION E gation, that s ind in the above	A MONTH is	ate OF RELEAtence is on file in mount, payment o	us authorization the case record and f which is hereby	d (check approauthorized
2. Ineligible federal 9. INCOME—Record each AMOUNT 10. IF RESTORED AFTER RELEA 12. CORRECTION OR CHANGE 13. CERTIFICATION: 1 certify the above facts hapriate box) (A) The above-named person is eligible.	ASE FROM IN PAYEE anged from ave been veri	e received, its PUBLIC IN NAME fied by investirity for the blicord with the	STITUTION gation, that sind in the above findings and	STATE Date of the specified and decision on appropriate the specified and decision on approximate the specified an	ate OF RELEA	ASEthe case record and f which is hereby	d (check approauthorized [
2. Ineligible federal 9. INCOME—Record each AMOUR 20. IF RESTORED AFTER RELEA 22. CORRECTION OR CHANGE Name on line 5 is corrected or cha 3. CERTIFICATION: I certify the above facts hapriate box) (A) The above-named person is elicated by the above payments are auth (C) Payment beyond the effective	ASE FROM IN PAYEE anged from ave been veri igible to secu- norized in according to the secu- re date stated	e received, its PUBLIC IN NAME fied by investirity for the blicord with the	STITUTION gation, that sind in the above findings and	STATE Date respective specified and decision on appear	ate OF RELEA	ASEthe case record and f which is hereby	d (check approauthorized [
2. Ineligible federal 9. INCOME—Record each AMOUR 10. IF RESTORED AFTER RELEA 2. CORRECTION OR CHANGE Name on line 5 is corrected or cha 3. CERTIFICATION: I certify the above facts hapriate box) (A) The above-named person is elicated in the second of the second or change.	ASE FROM IN PAYEE anged from ave been veri igible to secu- norized in according to the secu- re date stated	e received, its PUBLIC IN NAME fied by investirity for the blicord with the stabove is no leading.	STITUTION gation, that sind in the above findings and	STATE Da	ate of Release shown on line 5 of previous dence is on file in anount, payment of peal.	ASE	d (check approauthorized
2. Ineligible federal 19. INCOME—Record each AMOUNT 20. IF RESTORED AFTER RELEA 22. CORRECTION OR CHANGE Name on line 5 is corrected or change 3. CERTIFICATION: I certify the above facts hapriate box) (A) The above-named person is elicated in the content of the content	ASE FROM IN PAYEE anged from ave been veri igible to secu- norized in according to the secu- re date stated	e received, its PUBLIC IN NAME fied by investirity for the blicord with the stabove is no leading.	gation, that so ind in the above findings and conger authorize RVE FOR S	A MONTH is a second of the specified and decision on a part of the second of the secon	ate of Release shown on line 5 of previous dence is on file in anount, payment of peal.	the case record and which is hereby	d (check approauthorized

INSTRUCTIONS

Self-Explanatory Items Are Not Included in These Instructions

- 1. Date—Enter here the date the form is made out by the case worker.
- 2. Document Number—To be entered by a clerk in the district office. Enter here the next consecutive number from the Register of Action Documents. Do not enter this number until the form has been signed by the Deputy Director, State Department of Social Welfare, and the form is ready for transmittal to the Regional Office.
- 3. Case Number—The region and district number precede the number assigned to the case. Enter region number in first space, and district number in second and third spaces preceding the vertical line. If the district number is smaller than 10 enter region number in first space, "0" in second space and the district number in the third space; i.e., for Region 9, district 2 enter 9 0 2 |. The case number is entered to the right of the vertical line. When the case number has less than 6 digits, enter the number as far to the right as possible; i.e., | ___ 1 2 0 7.
- 5. Name—Enter the given name first, then the surname.
- 6. Address—If in the absence of a street address there is a P.O. Box No., RFD Route, or General Delivery designation, such designation precedes the name of the city or town. If a guardian is shown for Item 5, give address of guardian.
- 8. Enter the effective date of each grant in each column completed.
- 9. Total Need—Enter the total amount of need computed for each monthly entry; e.g., Total Need shown on Form Temp. 158.
- 10. Total Income—Enter the total amount of net income received by the recipient for each month for which an entry is made in Columns 1-4, and to be received in the month entered in Column 6; e.g., total Net Income as shown on Form Temp. 158. (See Item 19)
- 12. Entitled to Receive @ Rate of—Enter the monthly rate; i.e., the amount the applicant or recipient is entitled to receive for a full month. This cannot exceed \$85. If need is in excess of \$85 (Item 9) the amount shown in Item 11 is raised to the next higher whole dollar, provided it does not exceed \$85.
- 13. Amount Previously Authorized—The entry in this item for Columns 1-4 will be zero for all except supplemental payments. This item will be completed in Column 5 only on changes in grants on the continuing payroll (Master Deck), and discontinuances, and the amount entered is the amount shown for this item in Column 6 of the last authorization transmitted.
- 14. Amount To Be Paid—Enter the difference between Items 12 and 13 (12 minus 13). This amount will be equal to Item 12 for all case situations except supplemental payments and payments made to cover less than a full month for new, reapplications, or restorations. (In Column 6, the amount entered for Items 12 and 14 are identical.)
- 15.*Total Federal Excess—Enter the total amount reported in Item 12 that exceeds the Federal matching base; e.g., for an amount of \$85 reported in Item 12, the total excess would be \$35. If no Federal funds are available for the payment this item should be reported as zero.
- 15A.*Excess on Previous Payment—The entry in this item will be zero for all cases except supplemental payments. For supplemental payments, this entry will be the excess reported on the last authorization on file affecting the month specified in Columns 1-4; e.g., a case for which \$75 was authorized (Item 13) and now is to receive a supplemental payment of \$10 (Item 14) the total excess (Item 15) is \$35, the entry in this Item (15A) would be \$25.
- 15B.*Excess on This Payment-Item 15 minus Item 15A.
- 16.*Ineligible to Federal Participation—This item will be zero for all cases for which any Federal reimbursement is available. For all cases for which Federal reimbursement is not available, entries in this item will agree with the entry in Item 14 for Columns 1-4; Item 13 for Column 5; and Item 12 (and 14) for Column 6.
- 17.*Addition of Person to Payroll—Check the appropriate box for each column in which an entry is made. Check 0 for all supplemental payments. For all other case situations, check either 1 or 2. If Federal funds are to be claimed for a monthly payment, check 1. Check Item 2 only if no Federal reimbursement is available for the payment.
- Income—Record Each Amount of Income Received, Its Source and Month in Which Received;
 e.g., OASI \$25 beginning January, 1949
 Rent from Real Property—February \$10—March \$10
- 22. Correction or Change in Payee Name—If the name shown on Item 5 of the last authorization transmitted is incorrect or is to be changed because of marriage, or termination or change in guardianship, show corrected name in Item 5 of this authorization and in Item 22 show name as reported on line 5 of the last authorization transmitted. Also complete Columns 5 and 6.
- * Usually this item will be completed by clerical staff.

Certified as a Regulation (or Regulations) of the

Dest	of State Agency)
-{Name	of State Agency)
In	fulle Cheleaus ature)
(Sign	ature)
Din	eto)
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	2-17-50
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INIC 103, 103.5, 103.6, 2140, 3075

FILED

in the Office of the Secretary of State of the State of California

2/20/00

(OASIANB, APSB)

FEB 20 1950

DEPARTMENT BULLETIN NO. 339-A, REVISED

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

FRANK M JORDAN, Secretary of State

Subject: Monthly Statistical Report

on OAS and ANB

Effective with the March 1950 reports (due not later than April 8, 1950) monthly statistical reports on OAS and ANB shall be submitted to the State Department of Social Welfare by all county welfare departments each month in accordance with instructions contained in Department Bulletin No. 339 (Stat.) except as specified below. Reports on OAS, ANB and APSB shall be submitted separately on Forms Ag, Bl and APSB 237, revised December 1948.

All references in Bulletin No. 339 instructions to the "local Deputy Director SDSW" shall be construed to refer to the county board of supervisors.

OAS and ANB pending applications transferred to the counties by State Department of Social Welfare local offices effective March 1, shall be reported in Item 1. All approved cases carried forward from February and transferred to the counties by State Department of Social Welfare local offices shall be reported in Item 6.

Some applications of persons under 65 years of age may be awaiting action as of March 1, and may continue pending in subsequent months. Such applications shall be reported as usual in Items 5 and 5b of Form Ag 237 until acted upon (i.e., granted or denied) by the board of supervisors.

It will be necessary to grant aid for months prior to March 1, 1950, for certain of these applicants who will not have reached their 65th birthday by March 1, 1950, and who will cease to be eligible from an age standpoint for payments after February 28, 1950. Such cases shall be eliminated from the application section count in the report for the month in which action occurs by an inventory adjustment in Item 1 with an explanatory note. This means that they will not be included in any of the application or case counts for that or subsequent months.

With the exception of these "carry over" applications, Items 5a, 5b and 1l, on Form Ag 237 are no longer relevant and shall be omitted.

Copies of the final reports by the State Department of Social Welfare offices for February will be sent to each county as soon as available in March.

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET 12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

STATE OF CALIFORNIA

Department of Social Welfare

MYRTLE WILLIAMS
Sacramento 14
February 17, 1950

ADDRESS REPLY TO:

FILED

in the Office of the Secretary of State of the State of California

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

FEB 20 1950

At 30 o'clock M.
FRANK M. JORDAN, Secretary of State

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 338-C (OAS) Dated February 21, 1950 DEPARTMENT BULLETIN NO. 339-A, Revised (OAS, ANB, APSB) (Dated February 20, 1950) DEPARTMENT BULLETIN NO. 388-D (OAS, ANB) Dated February 20, 1950 DEPARTMENT BULLETIN NO. 403 (OAS) Dated February 1, 1950 DEPARTMENT BULLETIN NO. 404 (OAS, ANB) Dated February 21, 1950 DEPARTMENT BULLETIN NO. 405 (OAS, ANB, APSB) Dated February 21, 1950 DEPARTMENT BULLETIN NO. 406 (3 Aids) Dated February 22, 1950 DEPARTMENT BULLETIN NO. 407 Dated February 22, 1950 DEPARTMENT BULLETIN NO. 408 Dated February 22, 1950 DEPARTMENT BULLETIN NO. 409 Dated February 22, 1950

STATE SOCIAL WELFARE BOARD RESOLUTION

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 2140, 3075, and 3460 on February 16, 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, and operative on March 1, 1950, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

MYRTLE WILLIAMS, Director Department of Social Welfare

468:b5 Attachments Certified as a Regulation (or Regulations) of the

culturespare (Name of State Agency) (Signature) (Title) (Date)

MYRTLE WILLIAMS

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14

February 2/ 1950

FILED
In the Office of the Secretary of State
of the State of California

DEPARTMENT BULLETIN NO. 338-C (OAS)

(PROPOSED)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS
COUNTY WELFARE DEPARTMENTS

FEB 20 1950

At 4:30 o'clock M.

FRANK M. JORDAN, Secretary of State

By Deputy

Subject: Weekly Wire Report on OAS
Application Activity

This bulletin supersedes Department Bulletin No. 338 (OAS) and is effective March 1, 1950.

In addition to the usual monthly statistical report (Ag 237), a weekly wire (telegraph or teletype) report on OAS applications for the preceding week shall be submitted by each county each Monday morning. This report shall be sent to the Bureau of Research and Statistics, State Department of Social Welfare, 616 K Street, Sacramento. The first report under this bulletin is due on March 6, 1950, for the week ending March 4, 1950. SDSW district offices have been instructed to report the number of applications received on February 27 and 28 to the counties so that a report for the complete week can be submitted by each county on March 6.

The weekly wire is to report the number of OAS applications (including reapplications) signed during the week and the total number of OAS applications pending at the close of the last day of business prior to the Monday morning the wire is due. The latest pending figure should equal the previous week's pending figure plus applications received minus applications disposed of during the week reported.

The wire shall include the following entries:

"Week ending		, Applications filed	
	Month	Day	
Pending		. ".	

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Signature)

(Date)

STATE SOCIAL WELFARE BOARD RESOLUTION

WHEREAS Article XXVII of the Constitution of the State of California provides for the transfer of the function of administration of Old Age and Blind Security from the State Department of Social Welfare to the several counties, and,

WHEREAS the Legislature of the State of California has implemented the aforementioned Constitutional Amendment, by the enactment of Chapter 10 Statutes of 1949 First Extraordinary Session requiring the reemployment of certain persons by the several counties of the State pursuant to Article XXVII of the Constitution of the State of California, and

WHEREAS said Chapter 10 was enacted as an urgency measure necessary to insure conformance with the requirements of Federal law for the continued receipt of Federal grants-in-aid,

THEREFORE BE IT RESOLVED that the State Social Welfare Board adopt as a governing policy for the purpose of conforming to Federal personnel standards provisions the same as those contained in Chapter 10 of the Statutes of the First Extraordinary Session of the 1949 Legislature, such policy to be blinding upon all the saveral counties of the State of California, and

be it further resolved that where county civil service rules are at variance with the provisions of this resolution the county civil service rules must be amended for this purpose to contain provisions which will meet the standards set forth in this resolution.

FILED

in the Office of the Secretary of State of the State of California

FFR 2.0 1950

FRANK M. JOBDAN, Secretary of State

MAIN OFFICE SACRAMENTO 616 K STREET STATE OF CALIFORNIA 14 Department of Social Welfare LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET CHARLES I. SCHOTTLAND 12 DIRECTOR SAN FRANCISCO OFFICE Sacramento GRAYSTONE BUILDING IN REPLY PLEASE REFER 948 MARKET STREET March 30, 1950 2 TO: FILED of the State of California Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

in the Office of the Secretary of State

MAR 3 1 1950

Dear Mr. Jordan:

Attached are three copies of the regulations issued by the State Department of Social Welfare with Adoption Manual Letter No. 20.

These regulations were adopted by the State Social Welfare Board on March 24, 1950, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Section 103, and are being filed in accordance with Section 11380 of the Government Code.

These regulations were adopted by the State Social Welfare Board to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

> Very sincerely yours, Schottland

CHARLES I. SCHOTTLAND, Director Department of Social Welfare

468: 65 Attachments Certified as a Regulation (or Regulations) of the

State Alipartment of Loc. Welfor
(Name of State Agends)
(Name of State Agency) Charles Schottland (Signature)
(Title)
3-30-50
(Date)

STATE OF CALIFORNIA Int DEPARTMENT OF SOCIAL WELFARE

in the Office of the Secretary of State

616 K STREET SACRAMENTO 14

March 31, 1950

MAR 3 1 1950

RANK MOORDAN, Secretary of State

ADOPTION MANUAL LETTER NO. 20

The attached revisions numbered 105 through 117 are to be entered in your copy of the Adoption Manual and the revision numbers canceled on the inside of the Manual cover.

These revisions were adopted by the Social Welfare Board on March 24, 1950, and are to be effective April 1, 1950.

Sec. 2146-00 has been added and Secs. 2310-00, 2360-00, 2478-00, and Appendix 6 have been revised in accordance with the procedure which requires that the agency which placed the child for adoption shall complete the Certificate of Adoption.

Sec. 2175-00 has been revised to delete the requirement that the placement of a child by a private agency not be contingent upon, or determined by, the payment of a fee.

Sec, 2205-00 has been revised to specify that a child born within ten months of the dissolution of the marriage is presumed to be the legitimate child of the marriage, making the consent of the presumptive father necessary unless the presumption is disproved.

Sec. 2235-00 has been revised to clarify the statement that the parent, while in one county, may sign a relinquishment of a child to an adoption agency in another county.

Sec. 2430-00 has been revised with respect to medical care, reports, and examinations. If medical care is needed prior to relinquishment, the parent's consent is necessary. After relinquishment, the agency may authorize medical care or surgery. The requirement of a blood test for syphilis may be omitted if the child is an infant and the mother's prenatal serological test for syphilis and clinical examinations are negative and there is no history of syphilis known to the agency.

Sec. 2470-00 has been revised to clarify the policy that the child shall be placed with adoptive parents whose religious faith is the same as his own or that of his parents. Exception may be made only in accordance with the expressed wishes of the parent or parents.

Appendix 23 and Appendix 24 have been brought up-to-date.

2146-00 CERTIFICATE OF ADOPTION

2146-00

The Certificate of Adoption, which Section 10250 of the Health and Safety Code requires the county clerk to file with the State Department of Public Health, calls for certain information to be furnished by the agency or department handling the adoption. This applies to the SDSW or the county adoption agency in an independent adoption; to the licensed adoption agency, public or private, in the agency adoption; and to the probation officer in the stepparent adoption.

Parts I and II of the certificate shall be completed by the agency or department which shall enter its name and address in the proper spaces (20 and 21) and transmit the form in duplicate to the county clerk, with the court report, at the hearing, or immediately after the granting of the adoption. (See Secs. 2360-00, D, and 2478-00)

2147-00 DENIAL - INDEPENDENT ADOPTION

2147-00

- A. If the State Department of Social Welfare or county adoption agency recommends that the petition for adoption be denied, it shall:
 - 1. File a full report with the court recommending a suitable plan for the child.
 - 2. Appear before the court for the purpose of representing the child. (Sec. 226B, Civil Code)

B. Filing Report

adoption agency recommending denial of an adoption petition shall be accompanied by a notice to the county clerk that recommendation is denial; that in accordance with the law, the State Department of Social Welfare or county adoption agency will appear at the hearing to represent the child; and that it requests notice of the hearing.

If the recommendation of denial is based on the fact that the home of the petitioners is not suitable for the child, the notice to the county clerk shall also request that the report be referred to the superior court for review. (Sec., 226, Civil Code)

2140-00 COURT APPEARANCE

2140-00

A. Appearance

The person or persons desiring to adopt a child and the child proposed to be adopted must appear before the court. (Secs. 227 and 227aa, Civil Code)

Exception

Provision is made for exception if the adoptive parent is commissioned or enlisted in the military service or auxiliary thereof of the United States, or any of its allies, or in the American Red Cross, and appearance is impossible or impractical. In such cases appearance may be made for such person by his or her counsel, commissioned and enpowered in writing to do so. (Sec. 227, Civil Code)

B. Examination by Court

The court must examine all persons appearing before it, each separately, When appearance is made by counsel, the court may, in its discretion, cause such examination of the adoptive parent, other interested party, or witness to be made upon deposition, as it deems necessary. (Sec. 227, Civil Code)

C. Agency Representation

There is no legal requirement that the investigating agency or agency making the placement shall have a representative in court if the recommendation is approval, and it is not customary to be so represented, except upon request of the court, the petitioners, or their attorney.

If the recommendation is denial, or if the petitioners withdraw their petition or have it dismissed but the parents consent is unrevoked, the law provides that the SDSW or public adoption agency shall appear before the court to represent the child.

2145-00 ACTION TO GRANT THE ADOPTION

2145-00

A. If the court is satisfied that the interests of the child will be promoted by the adoption, the party or parties adopting shall execute or acknowledge an agreement in writing that the child shall be treated in all respects as a lawful child of the party or parties.

In those cases where the adopting parent is permitted to appear by counsel the agreement may be executed and acknowledged by such counsel for such absent parent or may be executed by such absent parent before a notary public or any other person authorized to take acknowledgments, including the persons authorized by Sections 1183 and 1183.5 of the Civil Code. (Sec. 227, Civil Code) The court shall thereupon make an order awarding the custody of the child to the adopting parent or parents. (Sec. 227, Civil Code)

B. The petition, relinquishment, agreement and order, and any power of attorney and deposition must be filed in the office of the county clerk and shall not be open to inspection by any person other than the parties to the action and their attorneys, and the State Department of Social Welfare, except upon the written authority of the judge of the Superior Court. (Sec. 227, Civil Code)

2150-00 APPEAL - INDEPENDENT ADOPTION

2150-00

- A. Appeal may be filed in the Superior Court of the county in which the petition is filed. (Sec. 226, paragraph 9, Civil Code)
 - 1. By the natural parent or parents, or
 - 2. By the petitioners.

B. Grounds for appeal are:

- Failure or refusal of the State Department of Social Welfare or county adoption agency, within 180 days from the date of the filing of the petition, or the expiration of any extension of time granted by the court, to accept the consent of the natural parent or parents; or
- 2. Failure or refusal of the State Department of Social Welfare or county adoption agency to give its consent to an adoption in those cases where its consent is required.

C. The procedure is as follows:

- 1. The clerk of the court shall immediately notify the State Department of Social Welfare of such appeal.
- 2. The State Department of Social Welfare or county adoption agency shall file a report of its findings and the reason for its failure or refusal to consent or to accept the consent of the natural parent. A copy of the report must be sent to the attorney for the petitioners, or if they have no attorney, to the petitioners. If there is no further information to add to the full report already filed, the report can be a statement that there is no new information and that the recommendation of the State Department of Social Welfare or county adoption agency is based on the findings contained in the final report.
- 3. After the filing of the findings of the State Department of Social Welfare or county adoption agency the court may, if it deems that the welfare of the child will be promoted by the adoption:
 - (a) Allow the signing of the consent by the natural parent or parents in open court.
 - (b) If the appeal is from the refusal of the State Department of Social Welfare or county adoption agency to consent, grant the petition without such consent.

2147-00.

2. If the report of the State Department of Social Welfare or county adoption agency recommends denial of an adoption petition and the agency will appear at the hearing to represent the child, a copy of the report should be sent to the legal counsel for the agency. (Copy of report need not be submitted to the agency counsel if the hearing is to be postponed awaiting clearance of legal technicality or other obstacle.)

C. Setting the Case for Hearing

It is the responsibility of the petitioners' attorney to set the case for hearing, but if the recommendation is denial, the attorney may neglect or refuse to set it. If so, it shall be the responsibility of the State Department of Social Welfare or county agency to set it.

If notice of hearing is not received within thirty days after the filing of the report, the State Department of Social Welfare or county adoption agency should arrange for the hearing. The agent should consult with the legal counsel for the agency to determine whether the agent or legal counsel will discuss the matter with attorney for the petitioners and, if necessary, will contact the county clerk requesting that the case be set for hearing, and that notice of hearing be given to all parties.

If denial is recommended because of an obstacle, legal or otherwise, which may be cleared within a reasonable length of time (such as an action to declare the child free from custody and control of his parents, pregnancy of the woman petitioner, or the need for further time to observe the development or adjustment of the child), the hearing can be deferred awaiting clearance of the obstacle and the filing of a supplemental report. This will necessitate the setting up of a signal or tickler system by the district office or the county agency on all such denials so that the case may be set for a hearing and a plan approved by the court if the obstacle cannot be cleared.

D. Court Appearance

A representative from the State Department of Social Welfare or county adoption agency and/or legal counsel for the agency shall appear to represent the child at all hearings on adoption petitions where the court report has recommended that petition be denied.

2175-00

B. Attorney's Fees

Petitioners are responsible for any attorney's fees incurred by them.

C. Agency Fees - Public Agencies

There are no fees for the services of the SDSW or county adoption agency in investigating an independent adoption, and no fees for the services of the county adoption agency to natural parents or adopting parents in placing a child relinquished to it.

The county adoption agency at the time of filing a favorable report may require the adopting parents to reimburse it, up to \$200, for the cost of the care of the child from the time of relinquishment until placement for adoption. (Sec. 225p, Civil Code)

D. Agency Fees - Private Agencies

A private agency may charge a fee for service, based upon an actual sharing of costs of service, and clearly defined as such at the time of the application by the prospective adoptive parents.

2175-00 COSTS IN ADOPTION

2175-00

A. Court Costs

There are no filing fees nor court costs in an adoption action. There may be costs to the petitioners if other court action related to the adoption is necessary as follows:

- l. If the child is declared free from custody and control of his natural parents, there may be fees involved for service of citation and cost of publication in the newspaper of citation.
 - 2. If the consent of the father is eliminated under Sec. 224, Civil Code, there may be costs for personally serving him with the copy of the citation of the hearing, or for serving him by publication.
 - 3. If depositions are necessary under Secs. 227 and 227a, Civil Code, there may be fees for taking them.

2205-00 CONSENTS OR RELINQUISHMENTS REQUIRED

2205-00

Consent of Parents to Adoption

The following provisions refer to the fact of consent, and apply both to the consent used in independent or stepparent and to the relinquishment used in agency adoptions.

A. A legitimate child can not be adopted without the consent of its parents if living.

A child born within ten months of the dissolution of the marriage is presumed to be the legitimate child of the marriage, making the consent of the presumptive father necessary unless the presumption is disproved. Although ordinarily the word "month" as used in law refers to a calendar month, in reckoning the legitimacy of a child a month is computed as thirty days. A child born more than 300 days after the final decree of divorce, excluding the day of the divorce but including the day of the child's birth, would, therefore, be considered illegitimate.

- B. An illegitimate child can not be adopted without the consent of his or her mother if living. (Sec. 200, 224, Civil Code)
 - 1. A child born to a married woman is presumed to be legitimate, but there may be judicial determination that the mother is entitled to sole custody. (Secs. 193, 195, 231, Civil Code) See Sec. 2290-00, Sole Custody, Consent or Relinquishment.
 - 2. The consent of the father of a child born out of wedlock is necessary if the father has adopted it as provided for in Sec. 230, Civil Code.
 - 3. If a child born out of wedlock is legitimated by the subsequent marriage of the natural parents, as provided in Sec. 215 of the Civil Code, the consent or relinquishment by the father will be necessary under the following circumstances:
 - a. If the placement has been made independently, the father's consent will be necessary if the parents marry prior to the granting of the order of adoption by the court.
 - b. If the placement has been made by a licensed adoption agency, the father's relinquishment will be necessary if the marriage occurs before the mother's relinquishment is filed with the SDSW.

2200-00 CONSENT DISTINGUISHED FROM RELINQUISHMENT

2200-00

A. Consent:

A consent to adoption, which is an essential part of each independent or stepparent adoption, is a statement in writing signed by the natural parent that he gives his full and free consent to the adoption of his child by specified petitioners whose names appear on the consent form which he signs. Once signed, it may be withdrawn only with the approval of the court. The signing of consent does not however finally terminate his rights to, nor responsibility for, the child, nor does it transfer custody of the child to the petitioners.

B. Relinquishment:

The relinquishment, which is an essential part of each agency adoption is a statement in writing signed by the natural parent that he relinquishes the child to a specified licensed adoption agency for placement for adoption. The agency, in accepting relinquishment, assumes full responsibility for the child, selects the adoptive home, places the child, and joins in the petition for adoption. When the relinquishment is accepted by the agency and filed with the State Department of Social Welfare, the parents' rights to, and responsibility for, the child are terminated. The natural parents need not know the names of the adoptive parents, and do not consent to the adoption.

2235-00 FORM OF CONSENT OR RELINQUISHMENT

2235-00

A. Consent

- 1. In every adoption where the parents' consent is necessary, either independent or stepparent, the consent must be on a form prescribed by the SDSW, except when an agency licensed by the SDSW is a party to the adoption. (Secs. 224m, 227, Civil Code)
- The SDSW provides separate forms for stepparent adoptions, for independent adoptions, for use of parents residing in California, and for parents residing outside California.
- 3. The SDSW or county adoption agency may furnish the attorney with forms for use outside California, but the preferred procedure is for the SDSW or county adoption agency to secure such consents. It will accept a consent of a non-resident parent on a form other than that issued by the SDSW when the consent is properly executed and covers all essential points.

B. Relinquishment

- 1. There is no provision in the law regarding the form of the relinquishment which must be executed by the parent surrendering a child to an agency. Forms for use by adoption agencies are therefore prescribed by the SDSW.
- 2. If the parent resides outside the state at the time of relinquishing the child to an adoption agency in California, the relinquishment may be signed before a notary on a form prescribed by the SDSW and previously signed by an authorized official of the agency signifying the willingness of the agency to accept the relinquishment. (Sec. 224m of the Civil Code)
- 3. The parent while in one county may sign a relinquishment of a child to an adoption agency in another county. Such relinquishment may be signed before a representative of the SDSW or an adoption agency licensed by the SDSW on a form previously signed by an authorized official of the agency accepting the child, signifying its willingness to accept the relinquishment.

2225-00 CONSENT OF SDSW OR ADOPTION AGENCY

2225-00

A. In an Independent Adoption

1. In all cases in which the consent of the natural parent or parents is not necessary, the SDSW or county adoption agency shall, prior to the hearing of the petition, file its consent to the adoption with the clerk of the Superior Court of the county in which the petition is filed. (Sec. 226, paragraph 4, Civil Code)

If the parent or parents whose consents are necessary die after signing consent but before the adoption hearing, the consent of the SDSW or county adoption agency will be necessary. The consent of the parent or parents may be filed with the court report as evidence of the parents' wishes, but the adoption cannot be granted legally on the basis of the parents' consent alone. See Sec. 2105-00 for procedure on filing the report.

- 2. If the father or mother of a child to be adopted is outside the State of California, his or her consent may be signed before a notary and in such case the consent of the SDSW will also be necessary. (Sec. 226, paragraph 8, Civil Code)
- 3. If the child has been relinquished by his parents to an authorized agency in another jurisdiction, a written statement should be obtained from the agency which accepted the relinquishment certifying that the relinquishment was executed in accordance with the laws of the jurisdiction and giving its approval to the adoption (Form Adop M76). The relinquishment and the agency's certification shall be submitted with the court report in lieu of the parents' consent to the adoption by the petitioners.

B. In an Agency Adoption (Relinquishment)

If the child has been relinquished to a licensed adoption agency in California and placed by it, the agency must join in the petition for adoption and consent to the adoption. The consent may be included in the allegations of the petition. (See Form for Petition in Agency Adoption)

2230-00 CONSENTS NOT REQUIRED

2230-00

Although there is no legal requirement that consents shall be obtained from the following persons or agencies, it is desirable that they be interviewed and that a statement of their attitude towards the adoption be obtained:

- 1. The guardian of the person or of the estate of the child
- 2. The Juvenile Court when the child is a ward of the court
- 3. The children of the petitioners

In determining the suitability of the adoptive home consideration should be given to the attitudes of the prospective brothers and sisters and their acceptance of a new member to the family group and to the expressed opinion or reaction of the child or children fourteen years of age and over.

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2310-00

- 5. To prepare the Order of Adoption. (Sec. 227, Civil Code)
- 6. To have the case set for hearing in the Superior Court of the county in which the petition is filed.
 - 7. Generally the attorney will appear in court with the petitioners. He may make court appearance for the petitioner in military service if it is impossible or impracticable for the petitioner to be present, when commissioned and empowered in writing so to represent him. (Sec. 227, Civil Code)
- 8. To file in the office of the county clerk the Order of Adoption. (Sec. 227, Civil Code)
 - C. Data desired by department or county adoption agency and requested from attorneys:
 - 1. Copy of petition for adoption.
 - 2. Address of petitioners.
 - 3. Address of natural parents.
 - 4. Certified copy of birth certificate of the child.
 - 5. If necessary, other verifications such as marriage or death certificates or verification of dissolution of marriage.

2320-00 THE PETITION

2320-00

The petition for adoption should be reviewed and each statement checked to see that all necessary points are covered. If the investigation reveals discrepancies in the petition (such as petitioners' residence in another county or the omission of the signature of one petitioner), these should be discussed with the attorney immediately in order that the petition may be corrected or amended if necessary. (See Sec. 2100-00, Procedure for Filing Petition)

2300-00 NATURE OF THE INVESTIGATION

2300-00

"No hard and fast rules can be laid down as to what should be included in an adoption investigation. Certain general standards of procedure must serve as guides, but the plan for each investigation must depend on the circumstances involved. At no time should the procedure be permitted to become routine; otherwise the purpose of the investigation is likely to be obscured by the necessity for gathering routine information. Just as each child is an individual, so each adoption investigation must be planned individually."

2310-00 CONTACTS WITH ATTORNEY

2310-00

The agent should communicate with the attorney during the progress of the investigation and should keep him informed of the status of the case, clearing any necessary points with him. If the petitioners do not have an attorney (the law does not require that petitioners be represented by an attorney), necessary points should be discussed with them.

A. It is the agent's responsibility:

- 1. To work closely with the attorney, as the petitioners' legal counsel, submitting to him for consideration any problem which may arise during the course of the investigation.
- 2. To discuss with the attorney any proposed extension of time or recommendation of denial.
- 3. To give the attorney a copy of any report or findings submitted to the court. (Sec. 226, Civil Code)
- 4. To prepare for completion by the county clerk the Certificate of Adoption. (Sec. 10250, Health and Safety Code)

B. It is the attorney's responsibility:

- 1. To prepare and file the petition to the Superior Court of the county in which the petitioners reside. (Sec. 226, Civil Code)
- 2. To clear any legal barriers to the adoption.
- 3. To prepare (1) the agreement which the petitioners must execute or acknowledge in writing, stating that the child shall be treated in all respects as their lawful child, and (2) the consent of each spouse to the adoption of the child by the other spouse. (Secs. 223 and 227, Civil Code)
- 4. To prepare the consent to the adoption by a child over 12 years of age. (Sec. 225, Civil Code; see Appendices)

¹U.S. Children's Bureau (Publication No. 262, Mary Ruth Colby, Problems and Procedures in Adoptions, Washington, D. C., 1941, p. 68)

2360-00

such as verification of vital statistics if they were reviewed in the home, or explanation of conflicting information appearing in the questionnaire, verifications, or interviews.

- C. Agent's Evaluation of Suitability of Home. All significant factors should be considered, especially the opportunity which the home offers for the best development of the particular child. The length of time the child has been in the home and the affectional ties which may have been formed will enter into the decision.
 - D. Preparation of the Certificate of Adoption

The worker is responsible for preparing for the county clerk's completion the Certificate of Adoption. Two copies of the form with Parts I and II completed shall be sent to the county clerk with the court report whenever a recommendation of approval is made.

While the form provides for signature by one of the adopting parents verifying the data in Part II, the State Department of Public Health will accept the form without the signature if it is signed by the agency or the department. The worker can thus complete the form from the information in the case record and can submit it without an additional visit to the petitioners.

2360-00

- (g) Man Petitioner: The same subheadings may be used as shown for woman petitioner. Employment may be shown under a separate heading for him to include more details. Separate headings may also be used for military service and clearance of veteran's status. Information regarding the man petitioner's background and relatives, furnished by the woman petitioner ordinarily should be corroborated by him.
- (h) Petitioner's Children: Full information concerning the petitioner's children, if any, their development and care, education, occupation, health, etc., and their attitude toward the child to be adopted. If they have never had children, their statement of the reason why.
- (i) Inheritance Rights of the Adopted Child: Do the petitioners understand that the child will inherit from them equally with any natural children?
- (j) Finances: Financial situation including earnings, income, real property, savings—if none, the reason, debts, obligations, insurance, previous financial status, including any contacts with social agencies,
- (k) Other necessary discussion not covered under preceding topics.

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- (e) Placement: This should be discussed with both petitioners. Discussion should cover why petitioners wish to adopt the child; how they obtained him; date of placement; whether placement has been continuous; who assisted in making the placement (this should include names, addresses and information in detail); whether the petitioners are related to the parents, are friends or acquaintances, or have not met the parents; how much they know about the parents; whether they assisted the parents financially, and if so, to what extent; their attitude toward the parents and regarding the child's background or regarding the lack of information if it is limited or completely lacking.
- (f) Woman Petitioner: Description

Background: Date, place of birth, nationality descent; education (if age at completion of grade or high school deviates markedly from the usual age at completion, agent should discuss reasons); employment or employment history; marriages, and reasons for divorces, if any; information concerning children born to previous marriages. (If the children are minors, the question of their support should be discussed and verified.)

Relatives: Education of parents and siblings, their occupations, health-mental and physical; and any other pertinent information concerning them, including general family health history. (Names and addresses of siblings need not necessarily be obtained.)

Health: Physical and mental, including institutional record, if any.

Religion: Church attendance, participation in church activities, attitudes toward religion and church.

Citizenship: If foreign born, information concerning when and where citizenship was acquired should be obtained and verified. If not a citizen, information concerning legal entry should be verified.

Interests: Community activities, membership in clubs or organizations, hobbies, talents, recreation, etc.

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separately as well as together. This is important in determining whether each petitioner wishes to adopt a child, has a sincere interest in him, and wishes to consummate the adoption.

5. Content of the interviews: If conflicting information is given in the questionnaire, verifications, or interviews, the agent shall discuss this with the petitioner concerned in an attempt to reconcile the discrepancies. This shall be recorded in full in the narrative. Information given by one petitioner regarding the other petitioner's history should be corroborated by the other.

The interviews with the petitioners should cover the following information. There should be flexibility in the use of the outline. If the petitioners are interviewed separately the headings as listed are satisfactory. If they are interviewed together it may be more logical to list each petitioner's statement under the same topic, rather than covering the topic separately under the name of each petitioner. In some instances all the information may be obtained in one interview, but in other instances several interviews may be necessary to obtain all the information.

- (a) Introduction: Date, persons interviewed, place of interview.
- (b) Housing and Household: Brief description of the home, the neighborhood, availability of schools, composition of the household, atmosphere, etc.
- (c) Minor: Brief description of developmental history to date; adjustment in the home; attitudes of the petitioners, their relatives and other members of the household toward the minor and the proposed adoption.
- (d) Plans and Training: This should be discussed with both petitioners. The discussion should cover plans for the child's education and religious training their understanding of child care and training; discipline; and whether he will be told of his adoption. If the woman petitioner is employed, the discussion should include plans for care of the child in her absence.

23 10-00

district office in which the prison is located, as soon as the necessary information is received from the warden the agent to whom the case is assigned shall send a regular inter-office request, with full information to the district which renders the service.

If the warden or superintendent reports that the parent is unwilling to sign the consent, the agent to whom the case is assigned shall send him a form for refusal to consent, with the request that he have the parent execute it. This can be signed without the restoration of the parent's civil rights, as it is not a contract and does not involve any change in his status.

It is important that the agent make her contact with the warden or superintendent immediately in any case where a parent is in a state prison. If the matter is not cleared within a reasonable length of time (six weeks) after the request is made, follow up should be made by the agent.

If the parent is in a federal prison in California or in a state or federal prison in another state, the agent shall arrange to have him interviewed and his consent obtained according to instructions shown in Sec. 2710-00, Requests for Service on Independent Adoptions. The restoration of civil rights is not required in federal prisons and may not be required in other states.

If the parent is committed to a state hospital, the agent shall follow the procedure outlined in Sec. 2210-00.

If the parents are outside the state, the necessary information should be obtained if possible by requesting a social agency in the other state to interview them; otherwise, it may be obtained directly from the parents through correspondence.

If the parents of the child are a married couple, the same type of information should be obtained for each, according to the outline for interview. If the husband is not the father of the child, no background information regarding him is necessary, but full information should be obtained from the mother regarding the background of the natural father. Information should also be obtained from her regarding her husband's knowledge of the birth of the child and his attitude toward the adoption. If the mother is willing to have him interviewed, the placement and adoption shall be discussed with him.

In all cases in which the child is born out of wedlock, or is not the child of the mother's husband, the natural father shall be interviewed if the mother will permit and if he is available. If this is not possible, the mother shall be asked to give whatever information she can regarding the natural father, whether he acknowledged paternity, and whether he may have adopted the child under Section 230 of the Civil Code.

2370-00 THE NATURAL PARENTS

2370-00

A. Interviews with Parents

If the parents (or parent) are in the state, they shall be interviewed personally. If they reside in the district in which the petition is pending, the interviews shall be arranged by the agent handling the case. If they reside in another district, the agent shall request the district office or county adoption agency where the parents reside to interview them. (See Sec. 2710-00, Requests for Service on Independent Adoptions.)

If the parent is in a state prison in California the agent to whom the case is assigned shall write to the warden or superintendent (to the warden at Folsom, San Quentin, or Soledad, and to the superintendent at Chino, Lancaster, and Tehachapi) at the prison requesting:

- 1. A summary of any history and tests;
- 2. That the parent be informed of the pending adoption;
- 3. That he be interviewed regarding his attitude toward the adoption;
- 4. That the agency be notified of his willingness or unwillingness to consent;
- 5. If the parent is willing to consent, that he have the parent make the necessary request to the warden or superintendent to have his civil rights restored for the purpose of executing the consent, and that the warden notify the agency when an agent may interview the parent and take his consent,

As the interview with the parent will necessarily be made by the

2430-00

- 3. A report from the pediatrician attending the child shall be obtained prior to adoption placement, giving the physician's statement as to whether the child is ready for placement and including a report of a blood test for syphilis. If the child is an infant and the mother's prenatal serological test for syphilis and clinical examination are negative and there is no history of syphilis known to the agency, the serological test for syphilis on the child may be omitted. If the child is not an infant and the history shows that he has been under medical care, reports from all physicians rendering such care should be obtained.
 - 4. Infants in adoptive homes shall have continuous medical supervision from a physician, preferably a pediatrician. The agency shall obtain a report on an examination made in the month prior to the agency's approval of the adoption.
 - 5. Older children in adoptive homes shall have physical examination at least annually, or oftener, as recommended by the physician, or as the child's development and condition indicate. The agency shall obtain a report on an examination made in the month prior to completing the adoption.

C. Psychometric and Psychiatric Reports

1. The agency shall obtain psychometric and/or psychiatric examinations when observation of the child or information obtained regarding undesirable or questionable background indicates the need for it, (See Sec. 2680-00)

D. The Child's Development

1. The agency shall obtain as complete a history as possible concerning the maternal and paternal ancestry of the child, and consideration should be given to any possible hereditary factors in both the maternal and paternal histories. (These can be evaluated in only the grossest way as they may affect the probable inherited consitution of the child, since adjustment to life is the result of personalities built on childhood, emotional environment, and life experiences, as well as on original constitution.)

2430-00 THE CHILD - BASIC STUDY REQUIREMENTS

2430-00

A. Birth Information

The agency shall obtain and review the birth certificates as soon as possible and shall compare the name, date, place of birth, names of parents, and number of other children born to the parents with information obtained from the parents and other sources. If the investigation discloses that the child's birth was not registered within one year after birth, the agency may accept in lieu of the birth certificate other verifications of the identity of the child, such as, a baptismal certificate, hospital record, other documentary evidence, or affidavits of persons having knowledge of the time and place of the birth of the child. (See Sec. 2615-00)

Discrepancies shall be reconciled if possible and those which can not be reconciled shall be reported in the narrative and in the court report.

B. Medical Care, Reports, and Examinations

- 1. Infants shall have continuous medical supervision, preferably under a physician specializing in the field of pediatrics. If medical care is needed before the child is relinquished, the parents' authorization for it will be necessary. After it accepts the relinquishment and files it with the SDSW, thus assuming the rights and responsibilities of parenthood, the agency will authorize medical care or surgery. (Attorney General's Opinions NS1600 and 47/187.)
- 2. The agency shall obtain reports from the physician attending the birth of the child (in all cases of infants and as deemed advisable in cases of older children) concerning complications of pregnancy and birth, condition of the child, and reports of tests and examinations. (See Secs. 2655-00, 2660-00, and 2665-00)

2430-00

- 2. The agency shall review the facts in the case to determine whether relinquishments of living parents are necessary.
- 3. In connection with the adoption of every illegitimate child, the agency shall give consideration to the following possibilities:
 - (a) Whether there has been an adoption under Section 230, Civil Code. (See Sec. 2070-00)
 - (b) Whether the child has been legitimated by the marriage of the natural parents prior to the filing of the mother's relinquishment with the SDSW. (See Sec. 2205-00)

2430-00 (Continued)

2430-00

- 2. The agency shall make an effort to estimate the economic and social adjustment of the immediate relatives.
- 3. The agency shall observe the behavior of the child, as a knowledge of characteristic reactions and his responses are important guides in selecting the right family for the child, estimating his aggressiveness or timidity, sociability or seclusiveness, adaptability, emotional security, etc. (See Appendix, Behavior Characteristic of Certain Age Levels)
- 4. If the child was not placed at birth, the agency shall obtain a history of its development to the time of placement.

E. Legal Status of Child

1. The agency shall obtain complete information regarding the legal status of the child to determine whether the child is legitimate, illegitimate, orphan, half-orphan, left without means of identification, declared free from custody and control of his parent or parents, or a child having a legal guardian of his person and/or estate.

'2470-00 (Continued)

2470-00

Understanding and agreement that the agency may remove the child for cause at any time prior to completion of the adoption.

2475-00 SUPERVISION AFTER PLACEMENT FOR ADOPTION

2475-00

There shall be a supervised period of one year between placement and final adoption. This time may be shortened only upon written approval of the State Department of Social Welfare.

The purpose of this year of supervision is to allow a trial period during which the agency can evaluate the placement and decide whether it should become permanent or whether the child should be removed. It also provides an opportunity for the foster parents to have the experience of parenthood before making their final decision to assume legally all its rights and responsibilities.

In making its evaluation the agency will observe the child and his physical, mental, and social development. It will require periodic medical examinations and psychometric and psychiatric examinations when needed. It will observe the relationships and interrelationships in the home between the child, the foster parents, any other children, and other members of the household and family; the acceptance of the child by the family; the capabilities of the foster parents as parents; their understanding of the child and ability to meet his needs.

It will also keep informed of any changes in the adoptive home, such as marital status, social changes, health, employment, members of the household, and housing.

The agency, through its supervisory relationship to the parents while sharing with them responsibility for the care of the child, will be able to give them help and support during the time of initial adjustment as problems may develop. The supervisory visits should be a constructive experience for the parents preparing them for the time when the agency will relinquish full responsibility to them.

The frequency of the supervisory visits to the home by the agency shall be determined by the circumstances of each case and the discretion of the agency, but in no instance shall there be less than one visit each quarter. At least two visits shall be made when all the family members are at home.

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2470-00 (Continued)

2470-00

The racial background of the adopting parents and the child should be similar.

The child shall be placed with adoptive parents whose religious faith is the same as his own or that of his parents. Exception can be made only in accordance with the expressed wishes of the parent or parents.

The personality, temperament, education, intelligence and cultural level, stature, and coloring of the adoptive parents shall be considered in relation to the personality, temperament, physical appearance, coloring, cultural background, and potential mental ability of the child.

Children with special handicaps of a physical nature or related to personality or behavior, and those whose heredities suggest that problems may arise, should have homes selected with additional consideration of whether the adopting parents thoroughly understand and accept the child's condition and are able to meet his needs.

Children of the same family shall be kept together whenever possible unless it has been determined that this is not beneficial.

If two or more homes that are equally suitable for the child are considered, priority shall be given in order of filing of application. When the agency has offered a particular child to adopting parents and after discussion of all factors the adopting parents reach a decision to not accept the child, the agency shall make it clear that further consideration for another child will be given.

The agency shall maintain a list of approved homes sufficiently large to provide a wide basis of choice in selecting the home which will best meet the needs of the individual child.

B. Placement shall be based on the following:

- 1. All necessary relinquishments have been obtained and filed with the State Department of Social Welfare.
- 2. It has been determined by proper tests and examinations that the child is adoptable, and the study of the child has been completed. A thorough study of the prospective adoptive parents has been completed and the application has been approved.

Preparation of the child for placement. (See Sec. 2530-00)

Preparation of the adoptive parents for placement. Complete information concerning the health, mentality, personality, talents, and social background of the natural parents and the results of the study of the child shall be given to the adoptive parents. Identifying information such as names of natural parents need not be given. (See Sec. 2550-00)

2476-00 (Continued)

2476-00

- C. When the SDSW receives notice from the county clerk that the petition has been filed, it will send to the agency in duplicate its approval of the adoption. (Form AD 12, Report of SDSW)
- D. The agency shall file its report to the court attaching:
 - 1. The original relinquishment
 - 2. The acknowledgment by the SDSW of the filing of the relinquishment (Form AD 11, Acknowledgment of the Filing of an Adoption Relinquishment.)
 - 3. The waiver of the SDSW (Form AD 12, Report of SDSW). (See Sec. 2122-00.)
- E. The agency shall complete and forward to the SDSW the individual record card, Form Adop M42.

2478-00 RESPONSIBILITY OF AGENCY FOR PREPARING CERTIFICATE OF ADOPTION 2478-00

The adoption agency which has placed the child for adoption shall be responsible for completing the Certificate of Adoption. The form for the certificate will be supplied by the Department of Public Health, Bureau of Records and Statistics, Vital Records Section, 631 J Street, Sacramento.

Part II of the form, which calls for information regarding the adopting parents, should be completed first, verified and signed by one of them. Part I, which calls for information regarding the child and the natural parents, should then be completed and the name and address of the agency entered under Items 20 and 21.

Two copies of the form shall be sent to the county clerk with the court report or given to him immediately after the court hearing, in order that he may complete the certification in Part III and transmit the certificate to the Department of Public Health.

The Department of Public Health will then issue a corrected birth certificate in the new name of the child, will seal the original record in Sacramento, and will request the local registrar to seal his record. A copy of the corrected certificate may be obtained by the agency, the petitioners, or their attorney upon request and payment of \$1.00. See Appendix 6 for Provisions of the Health and Safety Code relative to this procedure.

2476-00 COMPLETING THE ADOPTION

2476-00

A. At the conclusion of the supervisory period the agency should furnish the attorney for the adopting parents with the following information to be included in the petition:

Petitioners

- 1. Complete names of petitioners and address.
- 2. Statement that petitioners are ten years older than minor.
- 3. Petitioners are residents of _____ County and State of California.

Child

- 1. Name by which the child is known and name as shown on birth certificate.
- 2. Name by which the child will be known upon completion of adoption.
- 3. Date of birth.
- 4. Place of birth.
- 5. If the child is twelve years of age or over, the fact that he consents to his adoption.

Parents

- 1. Statement of whether the child was born out of wedlock or in wedlock.
- 2. The child was relinquished to ______ Agency by the mother on _____ (date) ____ and by the father (if his relinquishment is necessary) on ___ (date) ____.
- 3. Action in lieu of relinquishment:
 - (a) If the parent is deceased, the date and place of death.
 - (b) If the parent has been deprived of custody and control (Section 701, Juvenile Court), the date and place of court order.
 - (c) If the relinquishment is not necessary according to Civil Code Section 224, paragraph 4, set forth the facts.
 - (d) If the child is a foundling, set forth the facts.
- B. At the same time, the agency shall notify the SDSW that it approves the completion of the adoption and will join with the adopting parents in the petition to the court. (Form AD 533, Request for SDSW Waiver and Approval.)

. 6 (Continued) 6 3/4.3

D. Adopted children - birth certificate

1. Certificate of adoption decree:

Whenever a decree of adoption has been entered in any court in the State declaring a child legally adopted a certificate of the decree shall be recorded by the clerk of the court with the State Registrar upon a form provided for that purpose, (Sec. 10250, Health and Safety Code)

Form of certificate:

The form "Certificate of Adoption" available through the State Department of Public Health, Bureau of Records and Statistics, shall be filled out by the agency or department handling the case and filed with the county clerk, who will complete and transmit it to the State Department of Public Health Bureau of Records and Statistics in Sacramento.

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The certificate shall be filed with the original record of birth, which shall remain as part of the records of the Bureau of Vital Statistics. (Sec. 10251, Health and Safety Code)

4. Decree of Adoption constitutes record of delayed registration:

If there is no original record of birth on file, the certificate of the · decree of adoption shall constitute a record of delayed birth registration, provided that the decree of adoption contains a statement of the date and place of birth. (Sec. 10251.5, Health and Safety Code)

5. Issuance of certificate:

Upon receipt by the State Registrar of a certificate of the decree of adoption, a certificate of birth shall be issued bearing the name of the child as shown in the decree of adoption, the names of his foster parents, the age of the foster parents, the sex, date of birth, and place of birth, but no reference in any birth certificate shall be made to the adoption of the child. (Sec. 10252, Health and Safety Code)

6. Prior certificate:

This birth certificate shall supplant any birth certificate previously issued for the child and shall be the only birth certificate open to public inspection. In form and contents, it shall be identical with a birth certificate issued to natural parents for the birth of a child, (Sec. 10253, Health and Safety Code)

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Revised March 24, 1950 Effective April 1, 1950

- (d) Affidavits filed in accordance with provisions (1), (2), and (3) shall be accompanied by at least one piece of documentary evidence showing place and date of birth as outlined in provision noted below; provided, however, that if a child has not reached its fifth birthday, the affidavit by the attendant or one parent is sufficient.
- (e) If none of the affidavits mentioned in (1), (2), or (3) can be secured, at least two documents, in which the facts showing the date and place of birth were recorded more than five years before the date of application. Original or certified copies of hospital records, baptismal certificates or other church records, school records, census records, insurance policies, or statements in applications for insurance, Army, Navy, or Marine discharges, naturalization certificates of foreign-born parents showing registrant's name and age, voting registration records, family Bible records, birth certificates of registrant's child, marriage certificates, newspaper notices of birth, if sufficiently complete to establish birth, shall be accepted. If the above-mentioned documents are not available, or are incomplete, the registrar may accept other documents which establish the facts.
 - (f) All affidavits filed pursuant to this section shall contain a statement showing the basis of the affiant's knowledge of the facts sworn to pertaining to the date and place of birth. Upon the filing of any such application with a local registrar he shall immediately transmit it to the State Registrar, together with the filing fee hereafter in Sec. 10618 of this Code. (Sec. 10616, Health and Safety Code)

3. Issuance of delayed Certificate of Birth:

The State Registrar after the expiration of ten days from receipt by him of acknowledgment of receipt of the duplicate application by the district attorney, shall review the application and the affidavits and documentary evidence accompanying it and if the evidence submitted complied with provisions of Secs. 10615 and 10616 (Health and Safety Code), he shall issue and file a delayed certificate of such birth. He shall prepare either duplicate or originals or certified copies of the certificate and transmit a copy to the local registrar of the district and the county recorder of the county in which such birth occurred, who shall index it as a record of "Delayed Certificates of Birth," except that if the birth occurred in a city and county he shall transmit a copy of the delayed certificate to the local registrar only. He shall also transmit either a duplicate original or certified copy of the certificate to the applicant without cost. (Sec. 10617, Health and Safety Code)

4. Filing Lee:

A fee of four dollars (\$4) shall be paid at the time of filing to the State Registrar or local registrar for each application filed. (Sec. 10618, Health and Safety Code)

APPENDIX - ADOPTION MANUAL

AFFENDIA - ADOFILON MANUAL	-	
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Subject	Number	or Date
ared to noneme		
CHANGES IN LAW		
Provision in effect at time of order determines procedure. Where two enactments covering same code section passed at sa session, latter applies	me	NS 5055
Amendment to law does not have retroactive effect	o managas	45/199
CITATION TO FATHER DEPRIVED OF CUSTODY		
Necessary though father deserted and presumptively dead		10311
CONSENT		
Conforms to law in effect at time of order Distinguished from relinquishment Father's consent cannot be eliminated under Sec. 224 unless ability to support child can be shown Guardian of minor—consent not necessary Identity of adopting parent must be shown on consent signed by natural parent Inmate of State Hospital may sign if competent Insane person in hospital for insane not capable of giving consent Legitimate child, both parents must consent though father awarded custody Legitimated child, natural father must consent Marriage Annulled—both parents must sign Mother deprived of custody by J. C. order need not sign Out of State—county clerk must certify to commission of notary witnessing Presumption of legitimacy, unless refuted, legal father must sign Presumptive father, husband of mother may consent as Presumptive father, court must look to laws of nature to determine which shall sign Sole custody, when married mother claims SDSW and agencies have power and duty to examine correctness Spouse's consent may be witnessed by agent of SDSW Vice—consul may witness outside United States Out of State consents valid though signed before notary in California prior to 9/15/45	6079 6	& NS4672 NS5685 8207 & NS 4672 6 & 9997 3/29/33 9261 7/17/30 7524 9261 7861 , 45/199 NS3778 45/199 45/287 9994 1/25/34
CONSENT BY SDSW		
Can be given without abandonment proceedings when child a foundling		NS 5322
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	Essentials	/30, 7524 & 9891
ORDE	CR OF ADOPTION	
	Procedure governed by law in effect at time	
OUT	OF STATE CONSENTS	
11.	Consent without United States valid if witnessed by vice-consul of United States	5 45/199
PARE	ENTAL RELATION	
	Action to determine not necessary if affidavit obtained from husband	7948
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	Wards of Juvenile Court can be placed for adoption by Probation Officer only if he is licensed as a County Adoption Agency.	
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	By same parents for purposes of citizenship	45/199
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INHERITANCE	
Relinquished Child would inherit from natural parents if they died before he was adopted	. 47/187
INMATE OF STATE HOSPITAL	
May sign consent if legally competent	\$546 & 9997
INSANE PERSON	
Not capable of giving consent to adoption	. 3/29/33
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JOINT CUSTODY OF CHILD	
Father and mother of legitimate unmarried minor equally entitled to custody and must both execute relinquishment	. NS1812
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Although legitimate child may be awarded to father, consent of mother also necessary	. 9261 . 8704
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I. LICENSING PROCESS

CPA 10	Application fo	r License	to Conduct	a Child Placing Agency
CPA 10 AD	Application fo	r License	to Conduct	a County Adoption Agency

CPA ll Application for Renewal of License to Conduct a Child Placing Agency

CPA 11 AD Application for Renewal of License to Conduct a County Adoption
Agency

CPA 30 License to Conduct a Child Placing Agency

CPA 30 AD License to Conduct a County Adoption Agency

II. FORMS USED IN THE RELINQUISHMENT PROGRAM

Agreements Between Parent and Agency

AD 507 Agreement Between Agency and Parent Signing Relinquishment to be used only as circumstances indicate

AD 530 Agreement Between Parent and Agency re Acceptance of Child

Applicants

AD 520 Preliminary Statement of Applicant

AD 521 Application for Child for Adoption

AD 552-A Notice of Application for Child

Authorizations

AD 560 Authorization to Mother's Physician

AD 561 Authorization to Applicants' or Petitioners' Physician

AD 562 Authorization by Natural Parent for Release of Information

AD 563 Authorization by Applicants or Petitioners for Release of Information

AD 564 Authorization to Employer

VA 3288 Request for and Consent to Release of Information from Claimant's Records

Child

AD 510 Family History Sheet on the Child or Face Sheet

AD 550 Notification of Acceptance of Child for Initial Study
AD 553 Request for State Department of Social Welfare Waiver

AD 558 Notice of Placement

AD 559 Notification of Termination of Care

R & S 44 Certificate of Adoption*

Court Notifications

AD 3 Notification of Pendency of Action (Agency and Independent)

AD 4 Acknowledgment of Receipt of Adoption Material from County Clerk

AD 28 Notification from County Clerk of Subsequent Action

Fiscal Forms Submitted by County Adoption Agencies

AD 800 Adoption Assistance Affidavit
AD 801 Detail - Individual Cost of Care

AD 803 Detail - Amounts Collected or Collectible to Defray Cost of Care

AD 807 Adoption Administrative Expense Affidavit

*State Department of Public Health form.

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	Signature							
	Legal father must sign unless presumption of legitimacy refuted		*				•	9891 NS1812 NS1812
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	In accordance with law in effect at time of order Consent of spouse of petitioner could be witnessed by agent							12/1/31 9994
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III. FORMS USED IN THE INDEPENDENT PROGRAM

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Adop M15	Child's Physician's Authorization
Adop M21	Employer's Authorization
Adop M26	Petitioner's Physician's Authorization
Adop M49	Mother's Physician's Authorization
Adop M51	Authorization by Petitioners for Release of Information
Adop M52	Authorization by Natural Parents for Release of Information
Adop M65	Parent's Authorization for Medical Care
AD 560	Authorization to Mother's Physician
AD 561	Authorization to Applicants' or Petitioners' Physician
AD 562	Authorization by Natural Parent for Release of Information
AD 563	Authorization by Applicants or Petitioners for Release of
	Information
AD 564	Authorization to Employer
VA 3288	Request for and Consent to Release of Information from Claimant's
	Records

Consents and Actions in Lieu of

AD 1	Consent to Adoption by Parent in California (legitimate)
AD lA	Consent to Adoption by Mother in California (illegitimate)
AD 1C	Consent to Adoption by Parent Outside California
AD 1D	Consent to Adoption by Presumptive Father in California
AD LE	Consent to Adoption by Presumptive Father Outside California
AD 1F	Consent to Adoption by Parent Outside California in Armed Forces
Adop M50	Certificate by Superintendent of State Hospital or State Director
	of Institutions
Adop M76	Certification of Relinquishment (Used in lieu of consent from
	out-of-state agency)
Adop M20	Refusal to Give Consent to Adoption (legitimate)
Adop M23	Refusal to Give Consent to Adoption (illegitimate)
Adop M31	Withdrawal of Consent (Can only be used to withdraw consents
	signed before October 1, 1949)

Court Notifications

AD 3	Notification of Pendency of Action (Agency and Independent)
AD 4	Acknowledgment of Receipt of Adoption Material from County Clerk
AD 28	Notification from County Clerk of Subsequent Action
Adop M19	Request for Extension of Time for Filing Report to the Court
Adop M34	Order Granting Extension of Time for Filing Report

Medical Reports

Adop M35	Physician's Report on Adopting Parents
Adop M36	Physician's Report Regarding Child to be Adopted
	Report of Physician Attending Birth of Child Placed for Adoption
AD 512	Medical Information on Infant and Mother
AD 524	Medical Form on Applicant

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24 (Index of Forms Continued)
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II. FORMS USED IN THE RELINQUISHMENT PROGRAM (Continued)

Forms Submitted by State Department of Social Welfare

AD 11 Acknowledgment of Relinquishment

AD 12 Waiver

Adop M74 Acknowledgment of Receipt of Notification of Procedure in Lieu of Relinquishment

Medical Reports

AD 512 Medical Information on Infant and Mother

AD 524 Medical Form on Applicant

Miscellaneous

AD 513 Developmental Schedule

AD 514 Statement for Worker Picking up Baby

AD 515 Questions Regarding Child Placed in Foster Home

AD 523 Certification by Adoption Applicant

AD 525 Request for Clearance with Agencies on Applicants

AD 22 Infant Dismissal Report Form

Relinquishments and Actions in Lieu of

AD 501 Relinquishment - Joint Custody - In State

AD 501-A Relinquishment - Joint Custody - Out of State

AD 502 Relinquishment - Sole Custody - In State

AD 502-A Relinquishment - Sole Custody - Out of State

AD 503 Relinquishment - Sole Custody - Out of County
AD 503-A Relinquishment - Joint Custody - Out of County

AD 503-A Relinquishment - Joint Custody - Out of County
Adop M50 Certificate by Superintendent of State Hospital or State

Director of Institutions

AD 551 Notification of Signing Relinquishment

AD 551-A Notification of Procedure in Lieu of Relinquishment

Statistical Reports

Adop M42 Individual Record Card - Relinquishment and Independent

Adoptions

Adop M56-A Monthly Statistical Report on Applications and Homes Adop M56-B Monthly Statistical Report on Signed Relinquishments

Adop M56-C Monthly Statistical Report on Adoption Placement Services

Verifications

AD 570 Verification of Birth - Out of State
AD 571 Verification of Death - Out of State

AD 572 Verification of Marriage - Out of State

AD 573 Verification of Divorce - In or Out of State

AD 574 Verification of Employment

R & S 111 Application for Certified Copy of Birth Record *

R & S 112 Application for Certified Copy of Death Record *

R & S 113 Application for Certified Copy of Marriage Record *
R & S 114 Application for Confidential Verification of Birth *

R & S 115 Application for Confidential Verification of Death *

R & S 116 Application for Confidential Verification of Marriage *

^{*} State Department of Public Health forms.

24 (Index of Forms Continued)

24

III. FORMS USED IN THE INDEPENDENT PROGRAM (Continued)

Verifications (Continued)

R	& S	111	Application for Certified Copy of Birth Record *	
R	& S	112	Application for Certified Copy of Death Record *	
R	& S	113	Application for Certified Copy of Marriage Record *	
R	& S	114	Application for Confidential Verification of Birth *	
R	& S	115	Application for Confidential Verification of Death *	
R	& S	116	Application for Confidential Verification of Marriage	1

IV. FORMS USED IN STEPPARENT ADOPTIONS

Consents

AD 2	Consent to Adoption by Parent Retaining Custody
AD 2A	Consent to Adoption by Parent in California Giving Custody to
	Husband or Wife of Other Parent
AD 2B	Consent to Adoption by Parent Outside California Giving Custody
	to Husband or Wife of Other Parent

Court Notifications

AD 3A	Notification of Pendency of Action (Stepparent)
AD 4	Acknowledgment of Receipt of Adoption Material from County
	Clerk
AD 28	Notification from County Clerk of Subsequent Action

^{*} State Department of Public Health forms.

24 (Index of Forms Continued)

III, FORMS USED IN THE INDEPENDENT PROGRAM (Continued)

Miscellaneous

AD 22 Infant Dismissal Report Form
AD 27 Report of Irregular Placement
Adop M72 Notice of Form Change

Adop M72 Notice of Form Change R & S 44 Certificate of Adoption *

Office Mechanics

AD M6 Receipt for Money Paid for Receiving Verifications Adop M32 Referral Form Adop M40 Adoption Work Sheet Adop M55 Statistical Card - Independent Adoptions Adop M57 Services: Intra-State and Out-of-State Requests Adop M61 Criminal Identification and Investigation Report Adop M66 Request for Clearance with Agencies on Petitioners Adop M69 Transmittal Sheet for Adoption Assignments Adop M75 Signal Card for Referral for Boarding Home License AD 525 Request for Clearance with Agencies on Petitioners

Questionnaires

AD 9 Questionnaire (Petitioners)

Adop M67 Information Concerning Parent of Child to be Adopted

References

AD 10 Reference Blank (Petitioners)

Statistical Reports

Adop M42

Time Study Report on Activities
Individual Record Card--Relinquishment and Independent
Adoptions

Adop M56

Monthly Statistical Report on Movement of Caseload in
Independent Adoptions

Adop M56-D Monthly Statistical Report on Independent Adoptions--County Agencies

Verifications

Adop M/	verification of Out-of-State Births
Adop M8	Verification of Out-of-State Marriages
Adop M9	Verification of Divorces (Used both in and out of State)
Adop M10	Verification of Out-of-State Deaths
Adop M29	Employment Verification
AD 570	Verification of Birth (Out of State)
AD 571	Verification of Death (Out of State)
AD 572	Verification of Marriage (Out of State)
AD 573	Verification of Divorce (In or out of State)
AD 574	Verification of Employment

^{*} State Department of Public Health form.

Certified as a Regulation (or Regulations) of the

(Name of State Agency)

(Signature)

**Drettr*
(Title)

3-30-50

(Date)

11)4 10103,119,119.5,119.6

Title 22, 16.2

CHARLES I. SCHOTTLAND
Director

FILED Governor

FILED
In the Office of the Secretary of State

EARL WARREN

STATE OF CALIFORNIA

of the State of California

DEPARTMENT OF SQCIAL WELFARE

616 K STREET SACRAMENTO 14 March 30, 1950

MAR 3 1 1950

FRANK M. BRDAN, Secretary of State

DEPARTMENT BULLETIN NO. 411 (Merit System)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DIRECTORS
COUNTY AUDITORS

(Except those in Alameda, Contra Costa, Fresno, Los Angeles, Sacramento, San Bernardino, San Diego, San Francisco, San Mateo and Santa Clara.)

Subject: Revision of County Merit System Compensation Plan

The present Merit System compensation plan given in Manual Section 071-05 (formerly given in Department Bulletin No. 301) has been in effect since July 1, 1947. A special committee of the Merit System Advisory Committee has made a study of the present compensation plan and has recommended a much needed revision of the compensation plan.

Several weeks ago, all members of boards of supervisors and county welfare directors were sent a circular letter asking for comments and criticisms on the proposed new compensation plan, and almost without exception, the proposed revision of the compensation plan has been considered as a desirable and an acceptable improvement of the present compensation plan.

The proposed new compensation plan has the following features:

- a. The spread between the minimum and maximum salary rates is approximately 25%, instead of the 40% spread which is now in effect.
- b. Each salary rate is based on a uniform schedule of salary steps wherein each salary step differs progressively from the preceding rate by approximately 6%.
- c. The new plan provides a simple basis for increasing or decreasing salary rates uniformly, whenever it is found necessary, in multiples of 6% for each class.

Upon the recommendation of the Merit System Advisory Committee, the State Social Welfare Board, at its March 23, 1950, meeting, approved the attached compensation plan to apply to all employees in county welfare departments engaged in the administration of the public assistance and/or child welfare services programs for the 48 counties operating under the County Merit System. There is no restriction against any county from establishing an acceptable county-wide compensation plan of its own, provided (a) it applies to all employees of the county, (b) it is based on a comprehensive classification plan and adequate salary survey made by competent authority, and (c) it is approved by the State Social Welfare Board.

Organization Manager Barrey THE WE WANTED THE MANAGES (respect these and all the life by Teams) SECTION OF A BUSINESS AND The way of the State of the Sta Estimi, Wing . Prophare madeve Times of Louis to the series of 80-170 moderna irraeks ar nevia ajdo modinapiskop mareza 20m. Izraesi imir 14. kurresi Schristopa komina orașe sa addinărio de masa, sub trepulmonal addini virte infile 15. kurresi - Andrea de Maria de Maria Schristopa de Maria Schristopa (Maria Maria Maria Maria Maria) estat de troublique describe après e displication e en les en les configurations par finances este de . The section of Since The state of the second control of the state of the state of the state of the second control of the second con what a contract the second of the second of the second of the per appropriately and the second of the seco ivergre at defer verter tumpzen der membere ein beseich beorgesen. ... and the second of the same second procedures in the least of the territories of the second second second second The territories with the second s The second uni secondo de la companio del companio de la companio del companio de la companio del la companio de la companio del la companio de la companio del la companio de la companio de la companio del la comp Some get a generators and Some Ward And the state of t

The conditions under which this revised compensation plan is to be put into effect are outlined below: 1. The date on which the new compensation plan is to be effective in any county welfare department shall be the same date on which the county budget and/or salary ordinance becomes effective for the fiscal year 1950-51. 2. Each county must adopt a five consecutive step compensation plan from among the eleven salary steps shown on the attached sheet. This is the same method now used under the present plan. The same corresponding five salary steps must be used for all classifications used in the county welfare department. Example: If salary steps 3, 4, 5, 6, 7 are selected as the compensation plan, then salary steps 3, 4, 5, 6, 7 must be used for each class used by the county welfare department. 3. The salary of each employee must be at one of the established salary steps in the compensation plan as adopted by each county board of supervisors. 4. On the effective date of the compensation plan, each employee's salary must be at one of the established salary steps in the approved compensation plan. 5. The method of adjusting existing salaries to the new compensation plan is to be as follows on the effective date of the new compensation plan: a. Each employee's salary may be adjusted to the nearest step of the new compensation plan which is next to the salary rate received by the employee immediately prior to the effective date of the compensation plan. b. In no instance may the adjustment in salary rate exceed the equivalent of a three-step increase (under the new plan) between the salary rate previously received and the salary rate to be received under the new compensation plan, including the granting of an annual salary increase, c. Notwithstanding the provisions of item (5 b) above, whenever a pay range is increased for a given class, all salaries below the new minimum salary rate must be increased at least to the new minimum of the pay range for that class. d. All salary adjustments shall be made on an equitable basis and subject to the review and approval of SDSW. 6. It is recommended that all original appointments be made at the minimum of the pay range for the class. However, under certain circumstances (as explained in Manual Section 071-15) original appointments may be made at the second step of the pay range. No original appointment shall be made at the third step of a salary range without prior approval of SDSW, supported by information in detail concerning the personal qualifications of the employee, the prevailing rate for that type of work in the county concerned, or any other information which justifies the appointment at the third step of the pay range. Under no circumstances shall new appointments be made beyond the third step of any salary range. This requirement shall not apply in the case of promotions, transfers, or reinstatements. Department Bulletin No. 411 (Merit System) Page 2

in the second of the establishment of the property of the compared discussion and desired by the and their day of the adone of evidentia of of all main anticonquero were the following that of he affective in one to has begin to the of a decision with a size of the continue of the court of a line with the ligable frame deadly and got everythe execute terminal trainer port (Article a portion and a continuous continuous continuous and a continuous and a continuous Para lange and the few ever mellionograms of the section of the se The end of the state of the control The state of the s low or many and the The same of the figure of the second . Notice and of their exploration at the serve we want Line has dealers on a Their ery processione for the electricity wase, which electes note that an electricity is a continue to the electricity of the electr wicija stani elem inica jidela militarana nako aji io elem svi tostia ada mi ili . Contraction of the contract contract the second contract the second contract the second contract of the second contract the and the second of the second o as to be selected and the state of the solution of the state of the selections the state of the second the new control of the control of the base of the second section and the control of the control average the end as reduced the rise, at he was not been been as the paper .. 1 . gui er er alle til er er er er alle glende, andet dørde skale fille bede fle bede fle and the second of the second Air through a regional roll from the Landewick of an electric field. ong at the control of the part of a military are proved to be the control of explain a restrict metal corresponding at each except the usak on the first of And the control of the first and the state of the state o is the second of · somewhere it is the side of the side of the second of th facol de fipación llivia l'est e ser un bost più le com es la filia TO COLUMN THE PROPERTY OF THE vined with the means were of the to especially be analysed. there is a standard to the same can be not be set from their of the standard . Turbo end to soon ed ministration of the bull and the first of all all all i cente tra la secondición de del como aliabaca de la també de la como de la timbro del como la como named and and not appear that a seem contact the entire cap and appear 100 the data of the training and the parties of the pa su quita la cristiació secono por este como uno en la labora foregicar este la ejectoria de destable de la the agree to the property of the consequence of the first consequence of the agree of the consequence of the set of indiction of the transfer of the control of the first of the control of the contr only being deer right a continuous. He had not been a from a from a continuous of the second of the west deline, este recentico notro bio connet gerbero. To especimente est attendente best Transmission with the property of the last the state of any little to the contract by the additional are either top a state alterations, a so a describe the first seat and all the first data in the least . It is a factor of a figure of the contract o graduative and are the same of the

- 7. Cost of living adjustments paid in addition to basic rates of pay will not be permitted. Where such adjustments are granted in a county after adoption of the new compensation plan, salary increases to the nearest step may be made to approximate or equal the amount of the adjustment granted to county employees of other departments.
- 8. It shall be the responsibility of each county welfare department to notify the SDSW of the date on which the board of supervisors has adopted the new compensation plan and the date on which the new plan is to be effective, as shown by a copy of the action certified by the clerk of the board of supervisors or the county clerk.

Upon the request of any county, the staff of the SDSW is available for assistance to either boards of supervisors or county welfare directors in adjusting any problems which may arise as a result of adopting the new pay ranges.

Very sincerely yours,

Charles I. SCHOTTLAND, Director

Department of Social Welfare

Attachment

COMPENSATION PLAN OF BULLETIN NO. 411 APPROVED BY STATE SOCIAL WELFARE BOARD ON MARCH 23, 1950

CLASS IFICATION					PAY	RANGI	2				
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
County Welfare Director V	415	439	464	491	519	549	581	614	649	686	725
County Welfare Director IV	351	371	392	415	439	464	491	519	549	581	614
County Welfare Director III	297	314	332	351	371	392	415	439	464	491	519
County Welfare Director II	252	266	281	297	314	332	351	371	392	415	439
County Welfare Director I	201	213	225	238	252	266	281	297	314	332	351
Assistant County Welfare Director	332	351	371	392	415	439	464	491	519	549	581
Public Assistance Supervisor, Grade II	281	297	314	332	351	371	392	415	439	464	491
Public Assistance Supervisor, Grade I	238	252	266	281	297	314	332	351	371	392	415
County Child Welfare Supervisor, Grade II	261	297	314	332	351	371	392	415	439	464	491
County Child Welfare Supervisor, Grade I	266	281	297	314	332	351	371	392	415	439	464
Child Welfare Services Worker	213	225	238	252	266	281	297	314	332	351	371
Public Assistance Worker, Grade II	190	201	213	225	238	252	266	281	297	314	332
Public Assistance Worker, Grade I	170	180	190	201	213	225	238	252	266	281	297
Chief Bookkeeper Clerk	238	252	266	281	297	314	332	351	371	392	415
Senior Bookkeeper Clerk	190	201	213	225	238	252	266	281	297	314	332
Junior Bookeeper Clerk	161	170	180	190	201	213	225	238	252	266	281
Senior Stenographer Clerk	190	201	213	225	238	252	266	281	297	314	332
*Intermediate Stenographer Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Stenographer Clerk	144	152	161	170	180	190	201	213	225	238	252
Senior Typist Clerk	180	190	201	213	225	238	252	266	281	297	314
*Intermediate Typist Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Typist Clerk	144	152	161	170	180	190	201	213	225	238	252
Chief Clerk	225	238	252	266	281	297	314	332	351	371	392
Senior Clerk	180	190	201	213	225	238	252	266	281	297	314
*Intermediate Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Clerk	144	152	161	170	180	190	201	213	225	238	252
Receptionist	161	170	180	190	201	213	225	238	252	266	281

^{*} When, as, and if intermediate classes are created.

Certified as a Regulation (or Regulations) of the

Statelight Social Weeface
(Name of State Agency)

(Signature)

Durelov
(Title)

3-30-50
(Date)

117/0 22 CON 10 103, 103.5, 103.6

CHARLES I . SCHOTT LAND

EARL WARREN Governor

FILED

STATE OF CALIFORNIA In the Office of the Secretary of State
DEPARTMENT OF SOCIAL WELFARE of the State of California

616 K STREET SACRAMENTO 14 March 8, 1950

MAR 3 1 1950

DEPARTMENT BULLETIN NO. 410 (FISCAL)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

FRANK M. ORDAN, Secretary of State

By Man (Mary)

Subject:

Repayments; Return of Erroneous Repayments; Claim for Retroactive Payments. Article XXV Period (January 1, 1949, through February 28, 1950) OAS - SB

I REPAYMENTS

Effective March 1, 1950, repayments made to counties by recipients of Old Age Security and Security for the Blind, covering funds disbursed by either the State Controller or the county auditors under Article XXV of the State Constitution, shall be accepted by county welfare departments and placed temporarily in county treasuries pending reimbursement to the state. Reimbursement shall be made as follows:

- 1. Form ABC 808 (revised March 1, 1950) "Notice of Repayment", showing the allocation of Federal and State shares, shall be completed in full for each repayment.
- 2. Repayments placed in county treasuries shall, if possible, be deposited in an agency or other special trust fund. This bulletin is an order to each county auditor to draw a warrant at least once each fiscal quarter, or preferably, monthly where volume justifies, payable to the State Department of Social Welfare in the gross amount of all repayments received which apply to the Article XXV period. If the county does not maintain an agency or other special fund, the county board of supervisors is to authorize the county auditor to make such remittances to the State Department of Social Welfare. Warrants shall be accompanied by the supporting Forms ABC 808 and sent under a letter of transmittal to the State Department of Social Welfare, 616 K Street, Sacramento, attention of the Departmental Accounting Officer.

Reimbursement to the state by county warrant covers repayments applying to the entire period of January 1, 1949, through February 28, 1950, and applies to all counties even though the county auditor may have disbursed for all or a portion of that period. Repayments applying to the Article XXV period shall not be reflected in county claim affidavits, Form AB 800, nor included on Forms ABC 803, Report of Adjustments.

Beginning with the March 1950 claims, repayments applying to periods prior to January 1, 1949, need no longer be reported on separate county participation claims but shall be reported on current claims in the usual manner. (Sec. 672-25 of the Manual of Policies and Procedures.)

II RETURN OF ERRONEOUS REPAYMENTS

If any requests are filed by recipients or former recipients of Old Age Security or Security for the Blind for the return of erroneous repayments applying to the Article XXV period (1/1/49 through 2/28/50), the Bureau of Claims Accounting of the State Department of Social Welfare, 616 K Street, Sacramento, is to be contacted for instructions as to how such requests are to be processed. Complete information should be provided at the time of referral. This procedure applies to all counties.

Return of erroneous repayments applying to periods prior to January 1, 1949, or subsequent to February 28, 1950, are to be handled by all counties in accordance with Sections 674-05 and 674-10 of the Manual of Policies and Procedures and reported on current claims.

III CLAIMS FOR RETROACTIVE OLD AGE SECURITY AND SECURITY FOR THE BLIND PAYMENTS, APPLYING TO THE ARTICLE XXV PERIOD, DISBURSED BY COUNTY AUDITORS

(Applicable only to Alameda, Los Angeles, Monterey, San Benito, San Francisco, Santa Clara and Santa Cruz counties)

Claims for retroactive Old Age Security and Security for the Blind payments disbursed by the county auditors on or after March 1, 1950, but applying to the Article XXV period, as required in Bulletin 388-D, Item A, shall not be included with current claims. These payments are to be reported on separate payrolls, Form AB 801, and separate affidavits, Form Temp Ag or Bl 800 (Art. XXV). An initial supply of the new forms Temp Ag and Bl 800 (Art. XXV) will be forwarded to each of the appropriate counties as soon as available.

Very sincerely yours,

CHARLES I. SCHOTTLAND, Director Department of Social Welfare

Charles I Schottland

STATE OF CALIFORNIA

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET 2

Department of Social Welfare

CHARLES I. SCHOTTLAND DIRECTOR Sacramento March 30, 1950

IN REPLY PLEASE REFER TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

FILED

in the Office of the Secretary of State of the State of California

MAR 3 1 1950

chottland

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

> DEPARTMENT BULLETIN NO. 339-B (OAS, ANB) Dated March 10, 1950 DEPARTMENT BULLETIN NO. 410 (Fiscal) Dated March 8, 1950 DEPARTMENT BULLETIN NO. 411 (Merit System) Dated March 30, 1950

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 114b, 115, 119, 119.5, 119.6 on March 24, 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours.

CHARLES I. SCHOTTLAND, Director Department of Social Welfare

468:b5 Attachments Certified as a Regulation (or Regulations) of the

State Dept of Scene Merfue

(Name of State Agency)

(Signature)

Duillor
(Title)

3-20-50
(Date)

1297-1 CHARLES I. SCHOTTLAND

SECRETARY OF STATE

EARL WARREN

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 March 10, 1950

FILED

in the Office of the Secretary of State of the State of California

MAR 3 1 1950

FRANK M. JORDAN, Secretary of State

DEPARTMENT BULLETIN NO. 339-B (OAS, ANB)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS

Subject: Reporting in Item 1,

Forms Ag and Bl 237 for

March 1950

The count of applications pending at the end of February (Item 5, Form AB 337) may include requests for restoration in counties in which the February statistical reports on Old Age Security and Aid to Needy Blind were prepared by the State Department of Social Welfare district offices. In bringing forward this count to Item 1. Forms Ag and Bl 237 for March, it will be necessary for county welfare departments to adjust the pending count by excluding pending requests for restoration.

In order that the Ag and Bl 237 reports for March may be reconciled with the February reports, they shall be footnoted to show the number of pending requests for restoration that were eliminated from the count. Any other adjustments in Item 1 shall also be explained in a footnote.

Very sincerely yours,

CHARLES I. SCHOTTLAND, Director Department of Social Welfare

Charles I Schottland

STATE OF CALIFORNIA

Bepartment of Social Helfare

CHARLES I. SCHOTTLAND

DIRECTOR

Sacramento

March 30, 1950

IN REPLY PLEASE REFER

TO:

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET 2

> -Hon. Frank M. Jordan

Room 109, State Capitol Sacramento, California

Secretary of State

FILED

in the Office of the Secretary of State
of the State of California

MAR 31 1950

FRANK M ORDAN, Secretary of State

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Manual Letter No. 138.

These regulations were adopted by the State Social Welfare Board on March 24, 1950, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, and 114b, and are being filed in accordance with Section 11380 of the Government Code.

These regulations were adopted by the State Social Welfare Board to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

CHARLES I. SCHOTTLAND, Direct Department of Social Welfare

468:b5 Attachments Certified as a Regulation (cr Regulations of the

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STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 March 31, 1950

MANUAL LETTER NO. 138

The attached revisions are to be entered in your copy of the Manual of Public Assistance Policies and Procedures and the revision numbers added (if necessary) and canceled on the separators of the revised chapters. The revision numbers are as follows:

Blindness Applications Financial Procedures Revisions 32 through 41 Revisions 61 and 62 Revisions 486 through 491

These revisions were adopted by the Social Welfare Board on March 24, 1950, and are to become effective April 1, 1950.

In Sec. 180-15 the list of physicians making eye examinations has been brought up-to-date. If a reexamination is necessary for a person who is visiting out of state, the State Ophthalmologist will, on request of the county, designate examiners in that area who would meet the requirements for the reexamination.

Sec. 201-25, as revised, provides that a new application form shall not be completed if the SDSW finds that an appellant is eligible on degree of blindness. If the appeal is from denial of aid, a Certificate of Verification of Eligibility, Form Bl 201, shall be submitted. If the appeal is from discontinuance of aid, Notice of Change, Form Bl 232, shall be submitted.

Sec. 645-37 has been revised to provide that claims for cost of repairs and alterations shall be made on a monthly amortization basis rather than in full at the time the expenditure is incurred.

Sec. 645-71, as revised, provides the method for allocating the salary of an employee who is on vacation and/or sick leave for a full month or on vacation and/or sick leave for a portion of a month and off payroll the remainder of the month. Also, the section specifies that charges for telegraph and telephone expenditures be allocated to program at the time the charge is incurred by the person incurring the charge.

The following department bulletins are obsolete. FILED

in the Office of the Secretary of State of the State of California

No.	187	388-B
	224	388-C
	310	389
	367	390
	369	396
	377	403
	388-4	

MAR 31 1950

FRANK M. JORDAN, Secretary of State

200 15	BLINDNESS	Dalak Andrew Drawn
180-15	BLTM NA ESS	Public Assistance Program
180-15 (Continued)		1.80-15
BUTTE COUNTY		
Alexander, J. H. Bethel, Robert D. Chiapella, J. O. Plumb, C. E.	111 W. 2nd Street 1453 Downer Street 131 Broadway 310 Main Street	Chico Oroville Chico Chico
CONTRA COSTA COUNTY		
Dunphy, John Ford, Harry G. Harmon, Robert J. P. Keppen, Ford F.	2023 MacDonald Avenue 314 10th Street 314 10th Street 314 10th Street	Richmond Richmond Richmond Richmond
FRESNO COUNTY		
Awtrey, Hugh Grayman, Harry M. Hunt, Wayne Alvin Steinberg, Theodore Trowbridge, Dwight H. Whitten, R. H.	533 Patterson Building 714-719 Patterson Bldg. 1157 Fulton Street 621 Patterson Building 715-719 Patterson Building 719 Patterson Building	Fresno l Fresno l Fresno l Fresno l Fresno l
HUMBOLDT COUNTY		
Dolfini, Walter W. Hoilien, Maurice J. Iverson, Herman A.	539 G Street 431 F Street 507 F Street	Eureka Eureka Eureka
IMPERIAL COUNTY		
Clarke, William A. Edwards, S. R. Jaquith, George *Sonnenschein, E. L.	107 S. 5th Street Professional Building 116 North Plaza Phoenix Indian Sanatorium 1550 E. Indian School Road	El Centro El Centro Brawley Phoenix, Ariz.
TALYO COLDUNY	1990 E. Hidian School Road	Phoenix, Aliz.
INYO COUNTY		
Bambauer, L. S.	239 Academy Avenue	Bishop
KERN COUNTY		
Baisinger, L. F. Lange, Harry W. McKee, Keith S.	2026 17th Street 1629 Truxton Avenue 1706 Chester Avenue	Bakersfield Bakersfield Bakersfield
KINGS COUNTY		
Bassett, Alberta R.	Van Sicklen Building	Hanford
*Examinations limited to appl	icants and recipients from Yuma	Indian Reservation.
	(Section Cont	inued on Next Page) Revised March 24, 1950

SDSW-CALIFORNIA-MANUAL

180-15

180-15 DETERMINATION OF DEGREEOF BLINDNESS ANB, APSB

An eye examination by a duly licensed and practicing physician, skilled in diseases of the eye, is required by law to establish eligibility and continuance of eligibility. The physician's report must be submitted in writing over his own signature. (See Secs. 235-00, Physician's Report of Eye Examination, 180-50, Re-examination of Eyes to Determine Continued Eligibility, and 351-50, Reinvestigation of Blindness.)

Eye examinations shall be made by a physician whose name appears in this section, unless special authorization is given by the SDSW. If a reexamination is necessary for a person who is visiting out of state, the State Ophthalmologist will, on the request of the county, designate examiners in that area whose report would meet the requirements for the reexamination.

Reports from clinics as to degree of vision shall not be accepted. Each report shall be signed by the individual physician making the examination, and the fee paid to the physician rather than to the clinic.

In some counties there is no physician on the list for the county, while in other counties the distance to the nearest physician on the list for the county is great, thus necessitating transportation expense for the purpose of obtaining the necessary eye examination. Necessary expenses for transporting the applicant for, or recipient of, ANB to obtain the required eye examination are legitimate administrative expenses subject to federal reimbursement as is the physician's fee for the eye examination. (See Secs. 645-02, Expenditures for Purposes of Administration, 645-31, Expenditures for Eye Examinations, and 235-00, Physician's Report of Eye Examination.)

Out-of-state physicians who are skilled in diseases of the eye, and whose names appear on the following list, may examine California applicants for, or recipients, of, ANB or APSB to determine their eligibility in this state. (Walc 3083, 3471)

LIST OF PHYSICIANS MAKING EYE EXAMINATIONS FOR AND APSB

ALAMEDA COUNTY

Beresky, Tibor
Capus, Bertram
DeVaul, Charles H.
Dickson, Owen C.
Gallaher, John A.
Gump, M. E.
Gunderson, Ernest O.
Hessing, Ernest E.
Hirst, William R.
Howell, Homer P.
Magrath, Wm. A. S.
Padden, E. H.
Schnoor, Thos. G.
Sharpsteen, Jay Randolph
Stephens, B. M.
Stephens, Stuart B.
Wold, Alvin P.

2241 Cer	ntral Avenue
521 14th	h Street
1624 Fr	anklin Street
2628 Te	legraph Avenue
1425 Ra:	ilroad Avenue
411 30t	h Street
2436 Du	rant Avenue
1904 Fr	anklin Street
	ntral Avenue
3022 E.	14th Street
411 30t	h Street
1624 Fr	anklin Street
400 29t	h Street
426 17t	h Street
370 Wil	
	ntral Avenue
	h Street
700 270	

Alameda Oakland 12 Oakland 12 Berkeley 4 Walnut Creek Oakland 9 Berkeley 4 Oakland 12 Alameda Oakland 1 Oakland 9 Oakland 12 Oakland 9 Oakland 12 Piedmont 11 Alameda Oakland 9

180-15 (Continued)

180-15

LOS ANGELES COUNTY (Continued)

Irvine, A. Ray, Jr. Irvine, S. Rodman

Irvine, Wendell O.
Johnson, Ernest D.
Kaplan, Harry E.
Kelson, Ralph H.
Kinney, J. G.
Landegger, George P.

Lemere, H. B. Lifschutz, Jacob Ludmerer, Sol

Marrin, Charles Ainsworth
McBride, June Parratt
McCoy, Carroll A.
McKellar, James H.
Merkel, Emil E.
Miller, Nathan H.
Mills, Lloyd H.
Mills, Lloyd H., Jr.
Monaco, Louis

Morris, Samuel A. Nees, Oliver R. Nesburn, Henry R. Norene, Robert A.

Nugent, Maurice W.
Olkon, Dora Berkman
Penn, Sidney W.
Pollock, Franklyn J.
Popovich, Stephen John
Preston, Helen E.
Reed, Paul H.

Reynolds, Frederick G. Robbins, Alfred R. Roberts, Jay G. Roberts, Walter L.

Rogers, John Brady Ross, B. Cecelia Schillinger, Robert J.

Schuman, Irving Seech, Stephen G. 9730 Wilshire Blvd.
Roosevelt Bldg.
727 W. 7th Street
727 W. 7th Street
317 W. Main Street
1930 Wilshire Blvd.
353 E. Manchester Rlvd.
1137 2nd Street
Roosevelt Bldg.

Roosevelt Bldg.
727 W. 7th Street
9615 Brighton Way
105 N. San Vicente
Professional Bldg.
117 E. 8th Street
1530 Arizona Avenue
1052 W. 6th Street
227 W. Doran
111 N. Hudson Avenue
125 E. Glenoaks Blvd.

125 E. Glenoaks Bivd.
14334 Leimert Blvd.
609 S. Grand Avenue
609 S. Grand Avenue
Roosevelt Bldg.
727 W. 7th Street
6381 Hollywood Blvd.
508 Times Building
1680 N. Vine Street
Roosevelt Bldg.

727 W. 7th Street 2007 Wilshire Blvd. 8015 Beverly Blvd. 812 Pine Avenue 5720 Wilshire Blvd. 1930 Wilshire Blvd.

1136 W. 6th Street Roosevelt Bldg. 727 W. 7th Street 6333 Wilshire Blvd.

1930 Wilshire Blvd. 586 N. Main Street Roosevelt Bldg.

727 W. 7th Street
1401 S. Hope Street
1318 2nd Street
Roosevelt Bldg.

727 W. 7th Street 337 S. Beverly Drive 2007 Wilshire Blvd. Beverly Hills

Los Angeles 14 Los Angeles 14 Alhambra Los Angeles 5 Inglewood Santa Monica

Los Angeles 11, Beverly Hills Beverly Hills

Long Beach 2
Santa Monica
Los Angeles 14
Glendale 3
Pasadena 4
Glendale
Los Angeles 43
Los Angeles 28
Los Angeles 28

Los Angeles 11, Hollywood Long Beach 2 Hollywood 28

Los Angeles 14
Los Angeles 5
Los Angeles 36
Long Beach
Los Angeles 36
Los Angeles 5
Los Angeles 14

Los Angeles 14 Los Angeles 36 Los Angeles 5 Pomona

Los Angeles 14 Los Angeles Santa Monica

Los Angeles 14 Beverly Hills Los Angeles 5

(Los Angeles County Continued on Next Page)

180-15 (Continued)

180-15

LAKE COUNTY

Beil, M. Clemens

LOS ANGELES COUNTY

Abraham, Samuel V. Albaugh, C. H.

Alexander, Harold B.
Allison, Ray L.
Applebaum, Alfred
Appleby, Ruth
Armstrong, Richard C.
Balding, Grant
Balding, Willard V.
Behrens, Herbert C.
Beigelman, M. N.
Bell, Nelson C.
Brandenburg, Kenneth C.
Brownsberger, Sidney

Bullis, John A. Chamberlain, Calvin B. Christensen, Eugene L.

Cooley, Arthur D.
De la Reina, Solomon
Dow, Julian N.
Ellis, O. H.

Endres, William J.
Faier, Herman I.
Fairchild, Nora M.
Falk, S. M.
Faust, Joseph Milton
Feldman, A. William
Fields, Jack

Fields, Maxwell Godwin, Edmund D. Gorilla, Laurence Vincent

Gunzburg, Julian Hale, Channing W. Hare, Robert Hartman, Deane C.

Harwood, David Harwood, Samuel C. Hillyer, Ernest C. 6363 Wilshire Blvd. Roosevelt Bldg.

727 W. 7th Street 1060 E. Green Street 6305 Yucca

5096 Pacific Blvd. 1425 Glendon Avenue 595 E. Colorado St. 101 S. Madison St.

101 S. Madison St. 226 N. Greenleaf Avenue 1930 Wilshire Blvd.

586 N. Main St. 110 Pine Avenue Roosevelt Bldg. 727 W. 7th St. 3875 Wilshire Blvd.

Investment Building Roosevelt Bldg.

727 W. 7th St. 479 West 6th Street 224 Rosecrans Avenue 9730 Wilshire Blvd. Pacific Mutual Bldg. 523 W. 6th Street

523 W. 6th Street 2007 Wilshire Blvd. 939 S. Figueroa

701 S. Hoyt Avenue 1930 Wilshire Blvd. 7705 Seville Avenue

4418 Vineland also- 6363 Wilshire Blvd. 405 N. Bedford Drive

Professional Building Medical Arts Bld. 12307 Ventura Blvd. 416 N. Bedford Drive

Investment Bldg. 416 N. Bedford Drive Roosevelt Bldg.

727 W. 7th Street 2969 E. Florence Ave. 105 San Vicente Blvd.

1033 Gayley Avenue

Upper Lake

Los Angeles 48

Los Angeles 14
Pasadena 1
Hollywood 28
Huntington Pk.
Los Angeles 24
Pasadena
Pasadena 5
Pasadena 5
Whittier
Los Angeles 5
Pomona
Long Beach 2

Los Angeles 14 Los Angeles 5 Pomona

Los Angeles 14 San Pedro Manhattan Beach Beverly Hills

Los Angeles 14
Los Angeles 14
Los Angeles 5
Los Angeles
El Monte
Los Angeles 5
Huntington Park
North Hollywood
Los Angeles
Beverly Hills
Long Beach 2

Studio City Beverly Hills Pomona Beverly Hills

Los Angeles 14 Huntington Park Beverly Hills Los Angeles 24

(Los Angeles County Continued on Next Page)

180-15	BLINDNESS	Public Assistance Program
180-15 (Continued)		180-15
NAPA COUNTY		
Hunt, Carson E. Kittle, Dallas B.	2107 Jefferson Street 1333 Jefferson Street	Napa Napa
NEVADA COUNTY		
Powell, Barton J.	224 Church Street	Grass Valley
ORANGE COUNTY		
Currey, Hiram M. Elliott, Arthur C. Francis, Raymond Johnston, S. Theron Maxwell, H. C. Sellon, George I.	311 S. Main Street 620 N. Los Angeles St. 1424 N. Broadway 1520 N. Main Street 1718 N. Main Street 213 N. Pomona Avenue	Santa Ana Anaheim Santa Ana Santa Ana Santa Ana Fullerton
PLACER COUNTY		
Miller, William M.	320 Aeolia Drive	Auburn
RIVERSIDE COUNTY		
Berke, Samuel D. Chapman, Vernon A. Crawford, Walter J. Garrison, B. E. Harner, E. C. Stone, Vean M.	Plaza Hotel Bldg. Carnell Bldg., N. Palm Canyon & Andreas Road 3910 Market Street 5019 Sierra Street Palm Springs Clinic, 1091 N. Palm Canyon Drive 3616 Main Street	Indio Dr. Palm Springs Riverside Riverside Palm Springs Riverside
SACRAMENTO COUNTY		
Berg, John A. Fritschi, Ulrich A. Gray, John Edward Holstein, Theodore Kelsey, T. W. McKee, C. B. Wagner, Alfred W.	Medico-Dental Bldg. Medico-Dental Bldg. 2615 Capital Avenue Medico-Dental Bldg. Forum Bldg. California State Life Bldg. Medico-Dental Bldg.	Sacramento 11, Sacramento 11, Sacramento 11, Sacramento 11, Sacramento 11, Sacramento 11,
SAN BERNARDINO COUNTY		
George, A. R. George, Lewis C. Hadley, Carl M. Hooval, John H. Hull, Frederick H.	291 E. Street 291 E. Street Platt Bldg. 121 East F Street 1348 D Street	San Bernardino San Bernardino Ontario San Bernardino San Bernardino San Bernardino

San Bernardino

Moose, Ray M.

575 5th Street

180-15 (Continued)

180-15

Los Angeles 48

North Hollywood

Long Beach

Whittier

LOS ANGELES COUNTY (Continued)

Shanedling, Phillip D. Sitney, Julian J. Smith, Dennis V. Smith, Harry A. Smith, W. Burr Snow, H. L. Southgate, Paul T.

Steckler, M. I. Struble, Gilbert C. Thornburgh, Robert G.

Van Riesen, Milton H. Weeks, Carrol L. Weiss, Herman Whalman, Harold F.

Wilson, Clinton A. Wilson, Warren A.

Wright, Edwin S. Ziskin, Daniel E.

Zugsmith, George S.

MARIN COUNTY

Brinckerhoff, Albert J.

Denicke, Ernest S. Furlong, Robert M.

MENDOCINO COUNTY

Keaster, J. B.

MERCED COUNTY

McDowell, B. E. Willison, Eugene E.

MONTEREY COUNTY

Clark, Howard E. Glasgow, Stanley Condit Griess, R. O. Hastings, S. W.

6363 Wilshire Blvd. Lill 8 N. Vineland Ave. 110 Pine Avenue 226 N. Greenleaf Ave. 727 W. 7th Street 639 W. 9th Street Professional Bldg.

2007 Wilshire Blvd. 9730 Wilshire Blvd. Professional Bldg. 117 E. 8th Street

1930 Wilshire Blvd. 6333 Wilshire Blvd. Roosevelt Bldg.

1010 B.Street

3875 Wilshire Blvd. 1930 Wilshire Blvd. and- 9730 Wilshire Blvd. 5061 Lankershim Blvd. 1930 Wilshire Blvd. and- 6333 Wilshire Blvd. 529 W. 8th Street

117 E. 8th Street 229 North Central 727 W. 7th Street

Los Angeles 14 San Pedro Long Beach 2 Los Angeles 5 Beverly Hills Long Beach 2 Glendale 3 Los Angeles 5 Los Angeles 36 Los Angeles 14 Los Angeles 5 Los Angeles 5 Beverly Hills North Hollywood Los Angeles 5 Los Angeles 36 San Pedro

San Rafael (also in San Francisco County) San Rafael San Rafael

Willits

Merced

Merced

205 Bank of America Bldg. 1638 L Street

Alberts Bldg. 1010 B Street

Alberts Bldg. 1010 B Street

576 Hartnell Street 8 E. Alisal Street 8 E. Alisal Street Professional Bldg.

Monterey Salinas Salinas Monterey

(Section Continued on Next Page)

Revised March 24, 1950 Effective April 1, 1950

180-15	BLINDNESS	Public Assistance Program
180-15 (Continued)		180-15
SAN FRANCISCO COUNTY (Continued)	
Shaffer, Robert N. Smith, Joseph G. Tesauro, Nicholas	490 Post Street 490 Post Street 870 Market Street	San Francisco 2 San Francisco 2 San Francisco
SAN JOAQUIN COUNTY		
Broaddus, C. A. Brody, Yale Colbert, John J. Colliver, Samuel Plageman, William H. Powell, Dewey R. Powell, James R. Saslaw, Lewis B. Tipshus, Alfons F.	242 N. Sutter Street Bank of America Bldg. 302 N. California 343 E. Main Street 242 N. Sutter Street Medico-Dental Bldg. Medico-Dental Bldg. Bank of America Bldg. 242 N. Sutter Street	Stockton 2 Stockton Lodi Stockton Stockton 2 Stockton 2 Stockton 2 Stockton 2 Stockton 2 Stockton 2
SAN LUIS OBISPO COUNTY		
Butler, W. D. Kelker, G. David	1126 Garden Street	San Luis Obispo Cayucos
SAN MATEO COUNTY		
Murphy, William H. Sharpe, Otis Allen Sherwood, Robert O.	205 3rd Avenue 205 Park Road 128 Primrose Road	San Mateo Burlingame Burlingame
SANTA BARBARA COUNTY		
Campbell, J. Gary Gibb, W. Blake Hombach, Frank J. Loutfallah, Michel Mesirow, Maurice E. Richards, John M.	1525 State Street 1515 State Street 1421 State Street 1826 State Street (also- Ventura County) 117 E. Cook St. 1826 State Street	Santa Barbara Santa Barbara Santa Barbara Santa Barbara Santa Barbara
von Zelinski, W. F. SANTA CLARA COUNTY	22 W. Islay Street	Santa Barbara
Beard, Crowell Cassell, Irving Lee, Dorothea Liebenberg, Henry S. Martin, P. T. Reinhardt, Paul H. Rosehill, David B. Smith, Herbert Gordon Tanner, Owen R. Thygeson, Phillips	St. Claire Bldg. St. Claire Bldg. Medico-Dental Bldg. 123 S. 3rd Street Medico-Dental Bldg. 300 Homer Ave. Bank of America Bldg. 261 Hamilton Avenue 300 Homer Avenue St. Claire Bldg. (Section Contin	San Jose 23 San Jose 23 San Jose 20 San Jose 12 San Jose 20 Palo Alto San Jose 16 Palo Alto Palo Alto San Jose 23 nued on Next Page)
CDCM CATTEODNIA MANITAT	DETITOTOM 20	Revised March 24, 1950

180-15 (Continued)

180-15

SAN BERNARDINO COUNTY (Continued)

47 E. Vine Street Redlands Quinn, W. R. Redlands 2 West Fern Avenue Witter, Gordon L.

SAN DIEGO COUNTY

625 Broadway San Diego Berends, E. D. Bank of America Bldg. San Diego 1 Bond, Floyd M. 3315 4th Ave. San Diego 3 Kilgore, George L. Medico-Dental Bldg. Koke, Martin P. San Diego 3 Lauren, Geo. P. 205 Medico-Dental Bldg. San Diego 3 3166 5th Avenue Medico-Dental Bldg. San Diego 3 Lovekin, Louise Goux San Diego 3 Lucic, Hugo 3251 4th Avenue
Medico-Dental Bldg.
2001 4th Avenue
Bank of America Bldg. San Diego 3 Merrill, H. Ross San Diego 3 Monsees, Wayne E. San Diego 1 Prendergast, John J. San Diego 1 Ravin, Oscar G. Bank of America Bldg. San Diego 1 Rowland, Alan L.

SAN FRANCISCO COUNTY

San Francisco 8 Aiken, Samuel D. 384 Post Street 490 Post Street San Francisco 2 Barkan, Otto 2400 Clay Street San Francisco 15 Bettman, Jerome W. Blak, Einar V. 1801 Bush Street San Francisco 9 Borley, William E. 655 Sutter Street San Francisco 2 Boyle, S. F. San Francisco 2 490 Post Street San Francisco 2 490 Post Street Brinckerhoff, Albert J. (also in Marin County) 190 Post Street San Francisco 2 Campion, George S. 60 Vicente Street San Francisco 16 Carman, Henry F. Dickey, Clifford Allen San Francisco 8 450 Sutter Street San Francisco 8 Edgerton, Ambrose Earl 450 Sutter Street San Francisco 9 2107 Van Ness Avenue Eissler, Rolf Fine, Max 655 Sutter Street San Francisco 2 Hall, Thomas G. 516 Sutter Street San Francisco 2 384 Post Street San Francisco 8 Harrington, David O. Harrington, John T. 450 Sutter Street San Francisco 8 San Francisco 2 Hicks, Avery 490 Post Street Hogan, Michael J. 450 Sutter Street San Francisco 8 450 Sutter Street Hosford, George N. San Francisco 8 655 Sutter Street San Francisco 2 Jakobovits, Rafael Kadesky, David 1801 Bush Street San Francisco 9 450 Sutter Street San Francisco 8 Lachman, George S. 450 Sutter Street San Francisco 8 Maisler, S. McBain, Earle H. 490 Post Street San Francisco 2 Miller, Miriam Mohr, Selby 350 Post Street San Francisco 8

(San Francisco County Continued on Next Page) (Section Continued on Next Page)

San Francisco 8

San Francisco 2 San Francisco 2

Pischel, Dohrmann K.

Rodin, Frank H.

450 Sutter Street 490 Post Street

490 Post Street

180-15	BLINDNESS	Public Assistance Program	
180-15 (Continued)		180-15	
YOLO COUNTY			
Graeser, Henrik S.	507 Main Street	Woodland	
YUBA COUNTY			
Hodgin, Robert I. Montana, Rocco	603 D Street 725 Lth Street	Marysville Marysville	
OTHER STATES			
Clarke, Samuel Tracy Creveling, Earle L. Emmens, Thomas H. Magee, George R. Moulton, Olin C. *Sonnenschein, E. L. Woods, Ernest A.	Medico-Dental Bldg. 17 N. Virginia Street 207 Fluhrer. Bldg. 129 N. Virginia Street Medico-Dental Bldg. Phoenix Indian Sanatorium 1550 E. Indian School Road 295 E. Main Street	Reno, Nevada Reno, Nevada Medford, Oregon Reno, Nevada Reno, Nevada Phoenix, Ariz. Ashland, Oregon	

*Examinations limited to applicants and recipients from Yuma Indian Reservation.

			•
Public Assistance Program	BLINDNESS		180-15
180-15 (Continued)			180-15
SANTA CRUZ COUNTY			
Bivins, Thomas E. Hombach, Leo J. Shenk, Frederick P. Spencer, James A.	4 Soquel Avenue 345 Church Street Medico-Dental Bldg. Lettunich, Bldg.	Santa Cruz Santa Cruz Santa Cruz Watsonv il le	
SHASTA COUNTY			
Otten, Alex J.	212/ Market Street	Redding	
SOLANO COUNTY			
Green, John W. Johnson, Malcolm C. Madeley, H. Randall Marchand, D. C. Marquette, M. L.	727 Sonoma Street 539 Georgia Street 727 Sonoma Street 727 Sonoma Street 727 Sonoma Street	Vallejo Vallejo Vallejo Vallejo Vallejo	
SONOMA COUNTY			
Dick, Noble Every, Herbert M. O'Connor, C. Addison Patterson, Gilbert L. Sannella, Lee S. Spear, J. Leslie	618 4th Street 600 B Street 816 4th Street 1116 Mendocino Avenue 200 4th Street 576 B Street	Santa Rosa Santa Rosa Santa Rosa Santa Rosa Petaluma Santa Rosa	
STANISLAUS COUNTY			
Mottram, L. D. Porter, James A.	1115 I Street 1024 J Street	Modesto Modesto	
TEHAMA COUNTY			
Frey, Russell G.	737 Washington Street	Red Bluff	
TULARE COUNTY			
Keiper, George F.	113 N. Church Street	Visalia	
VENTURA COUNTY			

(Section Continued on Next Page)

Oxnard Santa Paula

Ventura

Ventura

(also- Santa Barbara County)

804 W. 5th Street

705 Main Street 468 E. Main Street

34 N. Ash Street

Cavins, Carl S.

Howarth, E. M.

Morrison, A. A.

Loutfallah, Michel

201-20 RIGHT TO MAKE APPLICATION OAS, ANB, APSB, ANG

201-20

Any person who believes that he meets the requirements of a specific category of aid has the right to apply for such aid and his application shall be received by the county. In ANC, this applies to the person who makes application for aid for the child. (See Sec. 201-00, Definition of Application.)

One who believes that he meets the eligibility requirements of more than one category of aid has the right to choose the type of aid for which he will apply. (See Sec. 102-60, Change From One Form of Aid to Another.) (W&IC 1560, 2140, 3075, 3460)

201-25 WHEN APPLICATION TO BE TAKEN OAS, ANB, APSB

201-25

An application shall be taken on all requests for aid at the time of the first interview, (i.e. at the time that the applicant first makes known his need) unless definite ineligibility under the law is apparent, and the applicant is convinced of that fact and therefore does not desire to continue with the application. (For exception see Sec. 215-00, Restoration of Aid.)

If aid has been denied, or if it has been discontinued for a period of more than 12 months, a new application shall be completed with the following exceptions:

- 1. When an application has been denied erroneously; i.e., if the county had information that the person was eligible but the application was denied because this information was misinterpreted or overlooked, or if the application was denied before all reasonable sources of information as to eligibility had been exhausted.
 - NOTE; If aid is granted on the same application that was denied erroneously, the board of supervisors shall formally rescind its previous denial. Formal notice of this action shall be sent to the SDSW. The Notice of Change form may be used for this purpose. The date of the original application will then govern the date when aid will begin. (See Sec. 611-50, Beginning Date of Aid New Applications);
- 2. If aid is granted on appeal to the SSWB;
- If the board of supervisors rescinds its former denial action as the result of a hearing by the board of supervisors. (See Sec. 325-00, Provisions of W & I Code Regarding Fair Hearing);

201-12 APPLICATION MADE BY AUTHORIZED REPRESENTATIVE OAS

201-12

An authorized representative who is making application for an UAS applicant shall present written evidence that he is the authorized representative. He shall complete the Application by Authorized Representative of the Applicant (Form Ag 200B) in triplicate. One copy shall be given to the representative as evidence that the application was made. The authorized representative shall not sign the application (Form Ag 200) unless he is the guardian of the person or of the estate. (See Sec. 201-10, Person Making Application.) (WAIC 2140, 2180, Prob. C 1405; AGO NS999)

The date on which the Application by Authorized Representative of Applicant (Form Ag 200B) is signed by the authorized representative shall be considered the date on which the application is filed. (WAIC 2140, 2183)

After receipt of an application filed by an authorized representative, the county shall call in the home of the applicant and secure the completed and signed application (Form Ag 200). An exact copy of the completed Forms Ag 200 and Ag 200B shall be given to the applicant. (WAIC 2140, 2180)

The original Form Ag 200B shall be attached to the original Form Ag 200. (See Sec. 250-05, Reporting Action on Application to SDSW) (WaIC 2140)

201-15 PERSON MAKING APPENCATION ANC

201-15

A parent, guardian, relative, or person in loco parentis may sign an application for a child or children. It is generally preferred that the person with whom the child is living sign the application.

When a child is in a boarding home or institution, the application shall be signed by the parent, guardian, or person responsible for the placement of the child. When a ward of the juvenile court committed to the Youth Authority has been placed or is about to be placed on parole in a boarding home, the application may be completed by the parole officer of the Youth Authority and filed with the county of residence.

When children of the same parent are living in different homes, separate applications may be made for the group in each home, or one application may be made for all the children. (WAIC 1560)

202-10 (Continued)

202-10

- 3. Pending applications;
- 4. Annual reinvestigations;
- 5. Transfers of cases to another county or from another county;
- 6. Completion of required period of county residence on non-county cases:
- 7. All requests for aid even though an application is not signed.

(SEE SEC. 201-00, DEFINITION OF APPLICATION.) (W&IC 1560, 2140, 3075, 3460)

202-15 SERVICES RENDERED BY COUNTY TO APPLICANTS OAS, ANB, APSB, ANC

2 02 - 15

The county shall establish procedures and provide facilities necessary for the purpose of carrying out the provisions of the OAS, ANB, APSB, and ANC laws. To this end the county shall maintain facilities to:

- 1. Receive applications of persons who believe themselves eligible for assistance:
- 2. Provide information as to eligibility requirements and other provisions of the laws;
- Assist applicants to complete the application blank and other necessary forms;
- 4. Assist applicants in need of such service to obtain proofs of eligibility:
- 5. Investigate applications promptly and diligently, establishing definite eligibility or ineligibility, unless the application is voluntarily withdrawn in the meantime;
- 6. Maintain the confidential nature of records;
- 7. Provide information as to availability of services by other agencies;
- 8. Render such other services as the individual or family may require.
 (W&IC 1560, 2140, 3075, 3460)

201-25 (Continued)

201-25

4. If the SDSW finds that an appellant is eligible on degree of blindness. The appeal may be from either denial or discontinuance of aid. If the appeal is from denial of aid, a completed Certificate of Verification of Eligibility, Form Bl 201, shall be submitted to the SDSW. If the appeal is from discontinuance of aid, Notice of Change, Form Bl 232, shall be submitted. (See Secs. 180-25, Successive Eye Examination Reports, 361-25, Retroactive Aid Payments by County, and 325-42, Stipulated Appeals.)

Aid may be granted under the ANB or APSB program on an application taken in either program (ANB or APSB) except if aid has been denied or has been discontinued for 12 months or more. (See Sec. 351-57, Transfer Procedure from ANB to APSB or Vice Versa.)

The application of a person whose grant of aid is being transferred from one county to another should be signed in the second county prior to the date aid begins, although aid shall not be interrupted if such prior signature is not obtained. (See Secs. 122-50, Removal from County of Residence, 122-65, Removal of Transferred Recipient to a Third County, and 122-70, Removal of Non-County Aid Recipients.) (Walc 2140, 3075, 3083.3, 3460, 3471.5; 3087.5, 3473.2)

202-10 COUNTY CARD FILES AND CONTROLS OAS, ANB, APSB, ANC

202-10

The county shall maintain a permanent master card file of all persons who have made application for OAS, ANB, APSB, and ANC, with the county number assigned to each. Some method of registering such numbers shall likewise be maintained. Such other card files and controls as may be necessary shall be maintained in connection with:

1. Active cases currently receiving aid;

2. Cases in which an application has been signed but aid has been denied or discontinued or in which the application has been cancelled or withdrawn;

645-35 EXPENDITURES FOR CONSTRUCTION OR PURCHASE OF BUILDINGS OAS, ANB, ANC

645-35

Initial Cost of Construction or Purchase of Public Buildings.

When an agreement provides the basis for defraying the initial cost of construction or purchase of a building to be owned by the local government, and its cost is to be amortized over a period of years as rent charges to the agencies or departments occupying space in such buildings, federal participation will be available in the amortization of the total cost of construction of new buildings provided:

- 1. The amount charged for space or the rate of amortization of the purchase price is not in excess of that which would ordinarily be charged in the same or in a similar community for comparable space in a privately owned building.
- 2. Maintenance and operating services included in the rental charge are clearly specified.
- 3. Information is provided as to the basis for amortizing the charges to include the total costs of the building, the particular agency's pro rata share, the total square footage to be occupied by each agency or department, the period of years over which the total cost is to be amortized, and the amount per square foot per year based on such period of amortization.
- 4. Form DFA 117A, Request for Approval of Expenditures for Construction or Purchase of Building is satisfactorily completed and submitted to the State Department of Social Welfare for their approval prior to commencing construction or purchase. Five copies of this form should be submitted to this office. One copy will be returned to the county after state has acted and passed on the request. (See Sec. 646499) (FSS-

645-37 EXPENDITURES FOR REPAIRS AND ALTERATIONS OAS, ANB, ANC

645-37

Federal matching of expenditures for repairs and alterations is based on the assumption that such expenditures are related to the maintenance of proper facilities for the administration of the public assistance programs. The approval of such expenditures is dependent upon whether or not these expenses are necessary for the administration of the assistance programs, are reasonable in cost and soundly planned. The approval or disapproval will in all cases be based on the circumstances of the individual situations.

Repairs and alterations may be defined as improvements or structural changes in a building which results in a better piece of property in the sense of greater durability or increased efficiency. The cost and the anticipated life of the improvement or change will often determine whether it is to be considered as a repair or alteration or merely a current maintenance repair. For example, the patching of a roof would be a maintenance repair, as defined in Sec. 645-39, Expenditures for Rent of County Offices, whereas replacement of a whole roof for a life expectancy of Several or alteration within the meaning of this section (Section Continued on Next Page)

OFFICE ONS 423 & 424

Revised September 24, 1948

Effective October 1, 1948 whole roof for a life expectancy of several years would be considered a repair

645-31 (Continued)

645-31

- 4. The distance to the nearest accessible ophthalmologist in the county on the panel is great and transportation to his office is necessary, or
- 5. The blind person is bedfast and the cost of transportation of the ophthalmologist to the home of the blind person is incurred by the county, or
- 6. The blind person requires an attendant to accompany him to the oph-thalmologist's office, thus incurring additional expense. (Walc 3075; FSS-Admin.)

645-32 EXPENSES OF SSMB APPOINTED COMMITTEES OAS, ANB. ANC

645-32

Federal participation may be claimed for expenses of members of county boards of supervisors, county officers, or county employees incurred while acting as members of a committee appointed by the SSWB.

All extra, identifiable expenses incurred by committee members in completing the assignment shall be considered as expenses performed as an aid to the operation of the public assistance program and shall be reimbursable as such.

Expenses of such committee members shall be classified as a maintenance and operation item and reported as current expenditure on worksheets submitted to the SDSW. If such expense is paid by a county agency other than the welfare department it shall be identified and reported separately, following welfare department expenditures.

Detailed records shall be maintained by the county in support of each expenditure claimed. (FSS-Admin.)

645-37 (Continued)

645-37

to be allocated on the basis of a reasonable prorated share, charged to each of the agencies sharing the space. Generally, this prorated share can be determined on the basis of the floor area occupied.

The amount chargeable to the welfare department shall be allocated in the same manner as other costs. Costs approved by the SDSW shall be reported currently and shall be identified as expenditures for repairs and alterations on the Administrative Expense Worksheet (Form DFA 64A). The county shall maintain records to substantiate the cost, the prorated share, if any, and the amount of the monthly amortization charge. (Walc 1560, 2140, 3075; FSS-Admin.)

645-39 EXPENDITURES FOR RENT OF COUNTY OFFICES OAS, ANB, ANC

645-39

Expenditures incurred by a county government in providing adequate office space for local public assistance operations will generally be expenses for which federal matching may be claimed.

Rent in Privately Owned Buildings.

Payments of rent, and of service and maintenance costs as defined above, in privately owned buildings will be subject to federal participation provided:

- 1. Benefit of the expenditure was received by the state or local public assistance agency; and
- 2. Payments are in accordance with the cost of comparable space and facilities in the community.

Service and Maintenance Costs in Lieu of Rent in Public Buildings.

Federal participation is available to meet costs incurred by local governments in lieu of rent for quarters occupied provided certain conditions are met.

In each instance in which federal matching is claimed for service and maintenance costs in lieu of rent in public buildings it is required that the county submit with its initial claim full information regarding the expenditures. The allowance of federal funds under this classification is dependent upon the information received from the counties.

Information in detail required from the county with its initial claim is:

- 1. Location of building. If the building is also occupied by another agency, indicate this fact.
- 2. The number of aquare feet of space in the building and the number occupied by the public assistance agency.

645-37 (Continued)

645-37

Before incurring expenditures for repairs and alterations for which reimbursement will be claimed, the following requirements shall be considered:

- 1. The expenditures must comply with the requirements of state law and federal regulations.
- 2. Form DFA-117 (Request for Approval of Expenditures for Repairs and Alterations) shall be completed in detail and four copies submitted to SDSW for approval.
- 3. Claims for reimbursement are not to be filed for expenditures for repairs and alterations until the county has been notified of approval and of the amount to be claimed.
- 4. Additional expenditures for further improvements may be required later and these costs, after they have been submitted and approved, may be added to the claim.

Costs of Repairs and Alterations to Publicly or Privately Owned Buildings.

Federal funds may match the expenditures of local government for repair and alteration of space occupied by a public assistance agency in either private or public buildings if not previously claimed as a part of rent. Matching may be claimed subject to the above provisions on a monthly amortization basis beginning with the month in which the repair and alteration is completed. The amount to be amortized shall be spread evenly over a period of months in accordance with the following principles:

- 1. The repair and alteration costs shall be amortized over a period of months equal to the useful life of the improvement.
- 2. The benefit of the repair and alteration must be realized by the public assistance agency within the period of occupancy of the building. Amortization, therefore, may be claimed only for those months during which the building is used or occupied by the public assistance agency and used for the purposes for which the repairs and alterations were allowed.
- 3. The economy of the expenditure shall be established by comparison with the amount of rent that would be required for other suitable space of comparable location, construction, facilities, and condition, with particular concern as to the adaptability of the space to the use of the public assistance agency.
- 4. Where space is also occupied by an agency other than the public assistance agency, the cost of the repairs and alterations will need

645-71 (Continued)

645-71

may be divided between extraneous and public assistance activities on the basis of a ratio established by experience.

This ratio and the time allocation plan for that portion of his time charged to public assistance must be approved in advance by SDSW.

4b. The salary of an employee who is on vacation and/or sick leave for a full month or on vacation and/or sick leave for a portion of a month and off payroll for the remainder of that month shall be allocated on the Administrative Expense Worksheet, Form DFA 64, in accordance with such employee's time report covering the last month or portion of a month worked.

Example: An employee worked January 1 to 31. He was on vacation and/or sick leave from February 1 to March 10 and off payroll for the remainder of March. His salary for February and March shall be allocated on the basis of his time report for January.

Sec. 645-50, Computing Less Than Full Monthly Salary, shall be followed in determining the amount of salary due an employee for periods of less than one month when such employee is not on per diem basis.

Expenditures for maintenance and operation or capital outlay are apportioned as follows:

5. If identifiable with a specific program, charge to that program.

Example: The cost of a supply of GR (formerly IN) forms, for use in the county office, is charged directly to the GR program.

645-71 RULES FOR ALLOCATING ADMINISTRATIVE EXPENSE OAS, ANB, APSB. ANC

645-71

In determining the proper program to be charged with an expenditure, consideration is given either to the program to which the benefits of the expenditure accrue or to the program necessitating the expense, whichever gives the most logical and equitable relationship between program and expense. All factors are considered and as much expense as possible identified with the individual program, thus insuring the soundest basis for apportionment of joint and over-all charges. The following rules govern the allocation of administrative expenses.

- 1. The salary of an employee working full time on a specific program is charged to that program.
 - Example: A public assistance worker is assigned to the ANC-el program and works full time on that program. His salary would be charged directly to the ANC-el (CA-el) program.
- 2. The salary of employee working on two or more programs, excluding supervisors and assistants whose time cannot readily be allocated as direct charges, is apportioned to programs on the basis of the number of man-hours worked on each program, as shown by time reports maintained by the employee.
 - Example: A clerk in the county office records 100 productive hours of work during a month, 75 hours on ANC-el and 25 hours on ANB. Therefore, 75/100ths of the employee's salary for that month is charged to the ANC-el program and 25/100ths to the ANB program.
- 3. The salary of employee who works on two or more but not all programs, whose time cannot be readily allocated and who is not included under 2 above, is apportioned as joint salary expense to the programs involved in the ratio that it bears to the total salary cost allocable to each program under 1 and 2, above.
 - Example: A public assistance supervisor, Grade 1, supervises public assistance workers assigned to OAS, ANB, APSB, and ANC. The portion of the supervisor's salary to be charged to the OAS program will bear the same ratio to her total salary as total salary cost allocated to the OAS program bears to the total salary costs allocated to the OAS, ANB, APSB, and ANC programs. It is necessary however to segregate time as to eligible and ineligible in the ANC program. Time spent on the APSB program shall also be recorded separately.
- 4. The salary of employee performing duties where none of his working time, or a neglible portion thereof, is identifiable with specific programs, is apportioned as over-all expenses in the ratio that the total salary cost of each program bears to the total salary cost of all programs, as ascertained under 1, 2 and 3, above.
 - Example: An accountant handles the accounting for all activities of the county welfare department. The portion of his salary charged to the OAS program bears the same ratio to his total salary that the total salary cost of the OAS program (excluding over-all salaries), etc.
- La. The salary of an employee of the county welfare department who normally spends a constant proportion of his time on extraneous activities

645-76 TIME RECORDING BY EMPLOYEES OAS, ANB, ANC

645-76

Salaries and wages paid to employees of a county welfare department are apportioned among the programs administered by the department in accordance with the ratio of gross man-hours worked on each program by each employee. Therefore, time reports are required of all welfare department employees, including the welfare director and supervisors. Time recording is a continuous process and the allocation of time to programs is accomplished individually by each employee. Forms used in the recording of employees' time are the Employee's Individual Daily Time Record, Form DFA 42, and the County Employee's Monthly Time Record, Form DFA 43.

645-71 (Continued)

645-71

- 5a. The charges for telegraph and toll telephone expenditures should be allocated to program at the time the charge is incurred by the person incurring the charge so that such costs may be properly allocated on the Administrative Expense Worksheet, Form DFA 64A.
 - Example: A telegram regarding a general relief matter should be allocated to GR (not to overall), or a telephone call made in the interest of several but not all programs should be charged at the time the call is made jointly to the programs involved and not as an overall charge.
- 6. If not readily allocable and not included under 5, and applicable to two or more but not all programs, charge as joint expense in the ratio that the total salary cost of each program involved bears to the total salary cost of all programs involved.
 - Example: A typewriter is purchased for use on OAS and GR (formerly IN) programs. The portion of the expenditure charged to the OAS program bears the same ratio to the total expenditure that the total of the salaries and wages allocated to the OAS program bears to the total of all salaries and wages of the OAS and GR programs, etc.
- 7. If not identifiable with specific programs, apportion as over-all expenses in the ratio that the total salary cost of each program bears to the total salary cost of all programs.
 - Example: A typewriter is purchased for general use and no portion of the cost is, therefore, assignable to any specific program or activity. The portion of the expenditure charged to the OAS program bears the same ratio to the total expenditure that the total salary cost of the OAS program bears to the total salary cost of all programs, etc. (FSS-Admin.)

Title 22, Uh. 2

Karl Marren

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND DIRECTOR Sacramento April 25, 1950

IN REPLY PLEASE REFER TO.

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

> DEPARTMENT BULLETIN NO. 412 (OAS) Dated April 24, 1950 DEPARTMENT BULLETIN NO. 413 (ANB) Dated April 24, 1950

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 2140, and 3075 on April 21. 1950.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

FILED

in the Office of the Secretarn of State]. Schottland of the State of California Director

468:b5 Attachments

APR 25 1950

FRANK M. JORDAN, Secretary of State

 Certified as a Regulation (or Regulations) of the

(Name of State Agency)
C I z chottlanda
(Signature)
Duesto
(Title)
4-25-50
(Date)

WYC 103, 103.5,21X0

CHARLES I. SCHOTTLAND Director

DEPARTMENT BULLETIN NO. 412 (OAS)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DIRECTORS

COUNTY AUDITORS

EARL WARREN Governor

State of California DEPARTMENT OF SOCIAL WELFARE 616 K Street Sacramento 14 April 24, 1950

FILED

in the Office of the Secretary of State of the State of California

Subject: Old Age Security Personal Property Eligibility

Bulletin 402, issued January 31, 1950, set forth rulings adopted by the Social Welfare Board governing personal property eligibility. That bulletin was adopted pending expression by the Legislature in relation to necessary revisions of the Welfare and Institutions Code to harmonize and integrate federal regulations and code provisions. The Legislature, in its First Extraordinary Session 1950, adopted SB 4 amending code provisions relating to personal property, and thus legislative intent has been expressed.

In accord with previously expressed policy of the Social Welfare Board that rules and regulations shall be in harmony with legislative intent those rules and regulations governing personal property as expressed in Bulletin 402 are cancelled. Although Senate Bill 4 will not become law until 90 days after the Legislature adjourned the provisions of this bulletin become effective immediately, and shall be placed in operation throughout the State.

Amended Code Section 2163 will provide:

"No aid under this chapter shall be granted or paid to any person who owns personal property, the value of which, less all encumbrances of record, exceeds one thousand two hundred dollars (\$1,200). No aid under this chapter shall be granted or paid to any married person living with a spouse who is also an applicant for or recipient of aid under this chapter, if the combined value of the personal property of both spouses, less all encumbrances of record, exceeds two thousand dollars (\$2,000). For the purpose of this section no life insurance policy shall be valued at more than its present surrender value to the applicant or recipient. Premiums paid on life insurance policies shall not be deemed income or resources of the applicant or recipient, whether or not the person by whom the premiums are paid is a responsible relative of the applicant or recipient, and no deduction therefor shall be made from the amount of aid granted to the recipient."

Amended Code Section 2163.2 will provide:

"For the purposes of this chapter the term personal property shall not include personal effects of the applicant or recipient. Personal effects include clothing, furniture, household equipment, foodstuffs, fuel and personal jewelry."

Code Section 2163.6, excluding interment plots and money placed in trust or insurance for burial or interment expenses. will be repealed.

The following rulings govern determination of eligibility from standpoint of personal property resources:

A. Limitation on Personal Property

I. Person is Single, Divorced, Widowed, or Separated, or is Living With a Spouse Who is Not an Applicant for or Recipient of OAS.

No aid shall be granted or paid to any person who owns personal property the value of which exceeds \$1200 after encumbrances of record are deducted.

The full market value of separate personal property owned by the applicant or recipient and his one half share of community personal property shall be considered in determining his eligibility.

Personal Property which is determined to be the separate property of a spouse who is not an applicant for or recipient of OAS shall not be considered in determining personal property holdings of the applicant (or recipient).

Example 1: A married couple living together own the following personal property.

\$ 900 market value of bonds (community property)
350 man's "paid-up" burial insurance (his separate property)
1300 bank account (her separate property)

The man applies for aid. The wife is neither an applicant or recipient. He is eligible because his one-half of the community property (\$450) and his separate property (\$350) does not exceed \$1200.

II. Married Person Living with a Spouse who is an Applicant for or Recipient of OAS.

No aid shall be granted or paid to any married person, living with a spouse who is also an applicant or recipient if

- (1) the value of such person's separate personal property and his share of community personal property exceeds \$1200 after encumbrances of record are deducted.
- (2) the value of the combined total personal property holdings of the applicant (recipient) and spouse exceeds \$2000 after encumbrances of record have been deducted.

"Combined" personal property includes all separate personal property owned by either spouse and their community personal property.

In every case in which the person is married and is living with a spouse who is also an applicant or recipient a determination must be made under both (1) and (2) immediately above.

Example 2: Married couple living together both apply. Investigation established personal property holdings as follows:

\$50 bank account (his separate property) \$1200 value of bonds (community) 700 bank account (her separate property) Aid is granted for the man because (1) his separate property (\$50) plus his one-half of community property (\$600) does not exceed \$1200 and (2) all of the property owned by both (\$1950) does not exceed \$2000.

Although combined property of couple is not in excess of \$2000, the wife's application is denied because her separate property (\$700) and her share of community property (\$600) exceeds \$1200.

When the spouse with whom a recipient is living applies for OAS no decision shall be made in relation to the continued eligibility of the recipient until the investigation of the separate and combined personal property of the couple has been completed.

If each of a couple is an applicant and/or recipient and the personal property of each spouse is determined not to exceed \$1200, but their combined total personal property holdings exceed \$2000, aid shall be granted (continued) to one spouse and aid for the other spouse shall be denied (discontinued).

The fact that aid can be granted to either one of the couple but cannot be granted to both shall be discussed with them. The decision as to which one shall receive aid rests with the couple but if it is to their advantage to grant to one rather than to the other this shall be explained to them.

Example 3: A married couple living together both apply. Their only personal property is community property which totals \$2300 or \$1150 each. The couple receives net rent of \$20 a month or \$10 each. The wife has medical needs of \$10 a month. The couple is therefore in agreement that it is to their advantage to grant aid to the wife who is eligible to the maximum grant whereas the husband would receive only \$65. Her application is granted, his is denied.

Example 4: Man is receiving aid. His separate personal property totals \$1100. The wife applies and investigation of her application reveals that she has \$1000 separate personal property. There is no community property. There is no advantage to them in granting to one or to the other. His aid continues and the wife's application is denied.

B. Separate and Community Personal Property

Evidence shall be secured to establish that property purported to be the separate property of the spouse is, in fact, his or her separate property.

Each of a couple is presumed to own a one-half interest in community personal property. Title to community property may be held jointly in the name of each of the couple, or it may be held in the name of either spouse. All personal property held in the name of the spouse of a married person is presumed to be community property but this presumption may be refuted by evidence which establishes the property as separate property.

C. Resources to be Considered When Determining the Amount of Personal Property Holding:

The value of personal effects shall be excluded when determining the total value of personal property holdings. "Personal effects" of the applicant or recipient include clothing, household furniture and equipment, foodstuffs, fuel and personal jewelry.

The value of the following types of property shall be considered when determining the total value of personal property resources. These include:

(1) Money and Securities: - Cash on hand, in a bank account or safe deposit

- (1) Money and Securities: Cash on hand, in a bank account or safe deposit box, in postal savings, on deposit with building and loan associations or otherwise held where it is payable on demand; stocks (for exception of water stock see Manual Section 143-55) bonds, notes, mortgages, deeds of trust, etc. Exception: Proceeds (cash and securities) received from the forced sale of the home (i.e., under condemnation proceedings) shall not be considered in determining personal property holdings for 12 months after receipt, provided the proceeds are to be used to purchase another home. (See Bulletin 402, II Real Property)
- (2) Motor Vehicles Vehicles of all kinds including automobiles used for necessary personal transportation. (See Manual Section 143-75)
- (3) Life Insurance The cash surrender value of a policy or policies of insurance on the life of the applicant or recipient, and on the life on the spouse. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either, except when the facts establish that the cash surrender value represents the separate property of the insured.
- (4) Burial Insurance The face value, not to exceed 5500, of paid-up insurance when it is the type of policy which is payable only at death, i.e., has no cash surrender value during the life time of the insured. (Such burial insurance is considered the separate property of the insured.)

 No value shall be placed on burial insurance if premium payments are required, or as a condition to payment of a specified sum upon death the insured must remain a member in good standing in a lodge, union or other organization with which he is insured. Such burial insurance is not "paid-up" insurance.
- (5) Burial Turst or Similar Funds The amount of funds placed in a burial trust or any similar fund earmarked for burial purpose.
- (6) Interment Plot Space intended to be used for interment purposes whether a plot in a cemetary, a cript, vault, etc. Such interment plot shall be considered to have a value of \$50 irrespective of the fact that the purchase price may have exceeded this amount.
- (7) Proceeds Received From the Following Sources:
 - a. Payments received because of judgments or as out-of-court settlements, or non-recurring lump sum payments received because of compensation laws; (see Manual Section 146-05)
 - b. Personal property received through inheritance, either by will or succession; (see Manual Section 144-10)
 - c. Cash received in a lump sum by the insured from the surrender or maturing of insurance policies;
 - d. Cash received by the recipient as beneficiary of an insurance policy or policies carried by the deceased spouse, including OASI lump sum death payments received by the recipient as spouse of an insured worker.

- cash received as a refund of excess premium payments (special dividend) on National Service Life Insurance (see Bulletin 397).
- f. Monrecurrent lump sum payments received by the recipient and/or his spouse from retirement or pension systems of which he or she was a former member; for example, State Employees Retirement System, Federal Employees Retirement Fund under the U.S. Civil Service Commission, retirement plans of private corporations, etc.

(8) Proceeds Resulting From Conversion of Property:

The return, exclusive of interest, dividends, etc., resulting from the sale of real or personal property, including the proceeds resulting from the sale of an entire holding of livestock, poultry, etc.

Exception: Proceeds (cash and securities) received from the forced sale of the home (i.e., under condemnation proceedings) shall not be considered in determining personal property holdings for 12 months after receipt, provided the proceeds are to be used to purchase another home. (See Bulletin 402, II, Real Property)

- (9) Leases The lessee's interest in a lease of real property for a period of years.
- (10) <u>Business Enterprise</u> The value of a commercial or other business enterprise including the value of livestock and fowl other than that retained for family use only, the value of farm equipment, etc.
- (11) Interest in Firms in Receivership The market value of an applicant or recipient's interest in defunct banks, building and loan associations, etc. (See Manual Section 144-15)
- (12) Conditional Sales Contracts The market value of the applicant's (or recipient's) equity in personal property being purchased under conditional sales contract except when the article being purchased represents a personal effect. (See Manual Section 144-00); the current market value of items of personal property being sold under conditional sales contract. (See Manual Section 144-05)
- (13) Undistributed Estates An heir's interest in an undistributed estate only when the property in the undistributed estate is in fact personal property and is available to the recipient prior to distribution.
- (14) Trust Funds An interest in the corpus of a trust only to the extent that the property is in fact available. (See Manual Section 144-08)

 Exception: Voney in a trust fund established to meet burial expense shall be counted as personal property see Item 5 of this section.

The fact that the personal property is held in another state or country is not occasion for disregarding it when determining eligibility.

D. New Cases

Actions of the board of supervisors on and after June 1, 1950, on all new applications, reapplications and restorations shall be in accord with the provisions of this bulletin. However, if it is administratively possible to apply the provisions of this bulletin prior to that date, eligibility shall be determined in accord therewith.

E. Continuing Cases

. . . .

Redetermination of personal property eligibility for all recipients presently receiving Old Age Security shall be initiated at once. As persons are found to be ineligible their aid shall be discontinued effective with the earliest possible date. The review of personal property eligibility for all recipients currently receiving aid must be completed in time to assure discontinuance of aid to all ineligible persons not later than June 30, 1950.

F. Revision of Manual of Policies and Procedures - Personal Property Chapter

Manual Sections in the Personal Property Chapter as they relate to OAS are obsolete in their entirety or are modified by this bulletin as follows:

140-00 - Paragraphs 1, 2, 4, 6, and 13 are obsolete.

141-00 - Obsolete

141-20 - Obsolete

142-00 - Obsolete except last paragraph.

143-15 - Paragraph 6, delete \$600" and substitute "statutory maximum". Delete last paragraph.

143-30 - Paragraph 2, delete "\$600" in lines 3 and 7 and substitute "statutory maximum",

143-79 - Obsolete

143-80 - Obsolete

143-81 - Paragraph 2, line 4, delete \$600" and substitute "statutory maximum". Line 7, delete "at \$575 or more" and substitute "within \$25 of the statutory maximum".

143-82 - Next to last paragraph delete "unless the maximum falls within the exemption allowed in the law."

143-83 - Obsolete

143-89 - Paragraph 3, delete "non-exempt" and the cross reference to Section 143-83.

144-08 - Delete last paragraph

146-00 - Paragraph 4 is deleted

146-12 - The examples are deleted

Very sincerely yours,

CHARLES I. SCHOTTLAND

Director

Charles I Schottland

Title 22, Ch. 2

Certified as a Regulation (or Regulations) of the

(Name of State Agency)
(Signature)
Kineton
(Title)
4-25-50
(Date)

UNIC 103,103.6, 3075

CHARLES I. SCHOTTLAND Director

DEPARTMENT BULLETIN NO. 413 (ANB)

TO: COUNTY BOARDS OF SUPERVISORS

COUNTY AUDITORS

COUNTY WELFARE DIRECTORS

EARL WARREN Governor

State of California DEPARTMENT OF SOCIAL WELFARE 616 K Street Sacramento 14 April 24, 1950

FILED in the Office of the Secretary of State of the State of California

APR 25 1950

FRANK M. KORDAN, Secretary of State

Subject: Aid to Needy Blind Personal Property Eligibility

Bulletin 402, issued January 31, 1950, set forth rulings adopted by the Social Welfare Board governing personal property eligibility. That bulletin was adopted pending expression by the legislature in relation to necessary revisions of the Welfare and Institutions Code to harmonize and integrate federal regulations and code provisions. The Legislature, in its First Extraordinary Session 1950, adopted AB 29 amending code provisions relating to personal property, and thus legislative intent has been expressed.

In accord with previously expressed policy of the Social Welfare Board that rules and regulations shall be in harmony with legislative intent those rules and regulations governing personal property as expressed in Bulletin 402 are cancelled. Although Assembly Bill 29 will not become law until 90 days after the legislature adjourned the provisions of this bulletin become effective immediately, and shall be placed in operation throughout the State.

Section 3047.2 added to the Code will provide:

"No aid under this chapter shall be granted or paid to any person who owns personal property, the value of which, less all encumbrances of record, exceeds one thousand two hundred dollars (\$1,200).

"No aid under this chapter shall be granted or paid to any married person living with a spouse who is also an applicant for or recipient of aid under this chapter, if the combined value of the personal property of both spouses, less all encumbrances of record, exceeds two thousand dollars (\$2,000).

"For the purpose of this section no life insurance policy shall be valued at more than its present surrender value to the applicant or recipient, Premiums paid on life insurance policics shall not be deemed income or resources of the applicant or recipient, whether or not the person by whom the premiums are paid is a responsible relative of the applicant or recipient, and no deduction therefor shall be made from the amount of aid granted to the recipient."

Section 3047.21 added to the Code will provide:

"For the purposes of this chapter the term personal property shall not include personal effects of the applicant or recipient. Personal effects include clothing, furniture, household equipment, foodstuffs, fuel and persona? jewelry."

Code Section 3047.1, excluding interment plots and money placed in trust or insurance for burial or interment expenses will be repealed.

The following rulings govern determination of eligibility from standpoint of personal property resources:

A. Limitation on Personal Property

I. Person is single, divorced, widowed, or separated, or is living with a spouse who is not an applicant for or recipient of ANB.

No aid shall be granted or paid to any person who owns personal property the value of which exceeds \$1200 after encumbrances of record are deducted. The full market value of separate personal property owned by the applicant or recipient and his one-half share of community personal property shall be considered in determining his eligibility.

Personal property which is determined to be the separate property of a spouse who is not an applicant for or recipient of ANB shall not be considered in determining personal property holdings of the applicant (or recipient).

Example 1: A married couple living together own the following personal property.

\$900 market value of bonds (community property)
350 man's 'baid-up" burial insurance (his separate property)
1300 bank account (her separate property)

The man applies for aid. The wife is neither an applicant or recipient. He is eligible because his one-half of the community property (\$450) and his separate property (\$350) does not exceed \$1200.

II. Married Person living with a spouse who is an applicant for or recipient of ANB

No aid shall be granted or paid to any married person, living with a spouse who is also an applicant or recipient, if

- (1) the value of such person's separate personal property and his share of community personal property exceeds \$1200 after encumbrances of record are deducted.
- (2) the value of the combined total personal property holdings of the applicant (recipient) and spouse exceeds \$2000 after encumbrances of record have been deducted.

"Combined" personal property includes all separate personal property owned by either spouse and their community personal property.

In every case in which the person is married and is living with a spouse who is also an applicant or recipient a determination must be made under both (1) and (2) immediately above.

Example 2: M...ied couple living together both apply. Investigation established personal property holdings as follows:

\$50 bank account (his separate property) \$1200 value of bonds (community) \$700 bank account (her separate property)

Aid is granted for the man because (1) his separate property (\$50) plus his one-half of community property (\$600) does not exceed \$1200 and (2) all of the property owned by both (\$1950) does not exceed \$2000.

Although combined property of couple is not in excess of \$2000, the wife's application is denied because her separate property (\$700) and her share of community property (\$600) exceeds \$1200.

When the spouse with whom a recipient is living applies for ANB no decision shall be made in relation to the continued eligibility of the recipient until the investigation of the separate and combined personal property of the couple has been completed.

If each of a couple is an applicant and/or recipient and the personal property of each spouse is determined not to exceed \$1200, but their combined total personal property holdings exceed \$2000, aid shall be granted (continued) to one spouse and aid for the other spouse shall be denied (discontinued).

The fact that aid can be granted to either one of the couple but cannot be granted to both shall be discussed with them. The decision as to which one shall receive aid rests with the couple but if it is to their advantage to grant to one rather than to the other this shall be explained to them.

- Example 3: A married couple living together both apply. Their only personal property is community property which totals \$2300 or \$1150 each. The couple receives net rent of \$20 a month or \$10 each. The wife has medical needs of \$10 a month. The couple is therefore in agreement that it is to their advantage to grant aid to the wife who is eligible to the maximum grant whereas the husband would receive only \$75. Her application is granted, his is denied.
- Example 4: Man is receiving aid. His separate personal property totals \$1100. The wife applies and investigation of her application reveals that she has \$1000 separate personal property. There is no community property. There is no advantage to them in granting to one or to the other. His aid continues and the wife's application is denied.

B. Separate and Community Personal Property

Evidence shall be secured to establish that property purported to be the separate property of such spouse is, in fact, his or her separate property. Each of a couple is presumed to own a one-half interest in community personal property. Title to community property may be held jointly in the name of each of the couple, or it may be held in the name of either spouse. All personal property held in the name of the spouse of a married person is presumed to be community property but this presumption may be refuted by evidence which establishes the property as separate property.

C. Resources to be Considered When Determining the Amount of Personal Property Holdings

The value of personal effects shall be excluded when determining the total value of personal property holdings. "Personal effects" of the applicant or recipient include clothing, household furniture and equipment, foodstuffs, fuel and personal jewelry.

The value of the following types of property shall be considered when determining the total value of personal property resources. These include:

- Money and Securities Cash on hand, in a bank account or safe deposit box, in postal savings, on deposit with building and loan associations or otherwise held where it is payable on demand; stocks, bonds, notes, mortgages, deeds of trust, etc. Exception: Money received by a recipient from the involuntary conversion of real property into personal property shall be considered real property for one year from the date the proceeds are received if the proceeds are to be used for the purpose of buying a home to meet the recipient's need for housing. (See Bulletin 402, II, Real Property)
- (2) Motor Vehicles Vehicles of all kinds including automobiles used for necessary personal transportation. (See Manual Section 143-75)
- (3) Life Insurance The cash surrender value of a policy or policies of insurance on the life of the applicant or recipient, and on the life of the spouso. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either, except when the facts establish that the cash surrender value represents the separate property of the insured.
- (4) Burial Insurance The face value, not to exceed \$500, of paid-up insurance when it is the type of policy which is payable only at death, i.e., has no cash surrender value during the life time of the insured. (Such burial insurance is considered the separate property of the insured.) No value shall be placed on burial insurance if premium payments are required, or as a condition to payment of a specified sum upon death the insured must remain a member in good standing in a lodge, union or other organization with which he is insured. Such burial insurance is not "paid-up" insurance.
- (5) Burial Trust or Similar Funds The amount of funds placed in a burial trust or any similar fund earmarked for burial purpose.
- (6) Interment Plot Space intended to be used for interment purposes whether a plot in a cemetery, a cript, vault, etc. Such interment plot shall be considered to have a value of \$50 irrespective of the fact that the purchase price may have exceeded this amount.
- (7) Proceeds Received From the Following Sources:
 - a. Payments received because of judgments or out-of-court settlements, or non-recurring lump sum payments received because of compensation laws; (see Manual Section 146-05).
 - b. Personal property received through inheritance, either by will or succession; (See Manual Section 144-10).
 - c. Cash received in a lump sum by the insured from the surrender or maturing of insurance policies;

d. Cash received by the recipient as beneficiary of an insurance policy or policies carried by the deceased spouse, including OASI lump sum death payments received by the recipient as spouse of an insured worker.

- e. Cash received as a refund of excess premium payments (special dividend) on National Service Life Insurance (see Bulletin 397).
- f. Nonrecurrent lump sum payments received by the recipient and/or his spouse from retirment or pension systems of which he or she was a former member; for example, State Employees Retirement System, Federal Employees Retirement Fund under the U.S. Civil Service Commission, retirement plans of private corporations, etc.

(8) Proceeds Resulting From Conversion of Property

The return, exclusive of interest, dividends, etc., resulting from the sale of real or personal property, including the proceeds resulting from the sale of an entire holding of livestock. boultry, etc. Exception:

Money received by a recipient from an involuntary conversion of real property into personal property shall be considered real property for one year from the date the proceeds are received if the proceeds are to be used for the purpose of buying a home to meet the recipient's need for housing. (See Bulletin 402, II. Real Property)

- (9) Leases The lessee's interest in lease of real property for a period of years;
- (10) Business Enterprise The value of a commercial or other business enterprise including the value of livestock and fowl other than that retained for family use only, the value of farm equipment, etc.
- (11) Interest in Firms in Receivership The market value of an applicant or recipient's interest in defunct banks, building and loan associations, etc. (See Manual Section 144-15)
- (12) Conditional Sales Contracts The market value of the applicant's (or recipient's) equity in personal property being purchased under conditional sales contract except when the article being purchases represents a personal effect. (See Manual Section 144-00); the current market value of items of personal property being sold under conditional sales contract. (See Manual Section 144-05)
- (13) Undistributed Estates An heir's interest in an undistributed estate only when the property in the undistributed estate is in fact personal property and is available to the recipient prior to distribution.
- (14) Trust Funds An interest in the corpus of a trust only to the extent that the property is in fact available. (See Manual Section 1/4-08)

 Exception: Money in a trust fund established to meet burial expense shall be counted as personal property see item 5 of this section.

The fact that the personal property is held in another state or country is not occasion for disregarding it when determining eligibility.

D. New Cases

Actions of the Board of Supervisors on and after June 1, 1950, on all new applications, reapplications and restorations shall be in accord with the provisions of this bulletin. However, if it is administratively possible to apply the provisions of this bulletin prior to that date, eligibility shall be determined in accord therewith.

E. Continuing Cases

Redetermination of personal property eligibility for all recipients presently receiving Aid to Needy Blind shall be initiated at once. As persons are found to be ineligible their aid shall be discontinued effective with the earliest possible date. The review of personal property eligibility for all recipients currently receiving aid must be completed in time to assure discontinuance of aid to all ineligible persons not later than June 30, 1950.

F. Revision of Manual of Policies and Procedures - Personal Property Chapter

Manual Sections in the Personal Property Chapter as they relate to ANB are obsolete in their entirety or are modified by the bulletin as follows:

140-00 - Paragraphs 2, 3, 4, and 7 are obsolcte.

141-00 - Obsolete

141-20 - Obsolete

143-15 - Paragraphs 1 and 5, the words "market Value" are to be substituted for "county assessed valuation," with relation to ANB. Also delete last paragraph.

143-30 - Paragraph 2, delete "\$600" in lines 3 and 7 and substitute "statutory maximum".

143-55 - Paragraph 2, Substitute "market value" for "assessed value."

143-60 - Paragraph 1 - Substitute "market value" for "county assessed value."

143-79 - Obsolete

143-81 - Paragraph 2, line 4, delete "\$600" and substitute "statutory maximum". Line 7, delete "at \$575 or more" and substitute "within \$25 of the statutory maximum". Paragraph 3, substitute "market value" for "county assessed value."

143-82 - Next to last paragraph delete "unless the maximum falls within the exemption allowed in the law!

143-83 - Obsolete

143-89 - Paragraph 3, delete "non-exempt" and the cross reference to Section 143-83.

144-00 - Paragraph 1, substitute "market value" for "assessed value."
Paragraph 2, substitute "market value" for "assessed valuation."

144-05 - Paragraph 2, substitute "market value" for "assessed value."

144-08 - Delete last paragraph.

146-00 - Paragraph 5 deleted.

146-12 - The examples are deleted.

Very sincerely yours,

CHARLES I. SCHOTTLAND

Charles I Schottland

Director

Certified as a Regulation (or Regulations) of the

Name of State Agency) (Signature) (Date)

1297-1299 CHARLES I. SCHOTTLAND SECRETARY OF STATE

EARL WARREN Governor

State of California DEPARTMENT OF SOCIAL WELFARE 616 K Street Sacramento 14 April 28, 1950

MANUAL LETTER NO. 139

The attached revisions numbered 492 and 493 are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers added and canceled on the separator of the Financial Procedures Chapter.

These revisions were adopted by the Social Welfare Board on April 21, 1950. Sec. 610-50 is effective May 1, 1950, and Sec. 611-90 is effective June 1, 1950.

Sec. 610-50 has been revised to permit the use of initials on an OAS or ANB warrant if the county's disbursement procedures make it difficult to use the full first name.

Sec. 611-90 as revised states that an aid warrant becomes void if not presented to the county treasurer for payment within six months after its date and every aid warrant shall carry notice of this fact. Any claim arising from a valid authorization to pay aid resulting in the issuance of an aid warrant becomes void on the same date as the warrant.

Effective May 1, 1950, the following portions of this Manual, insofar as they pertain to ANC, are superseded by the Manual of Policies and Procedures - Aid to Needy Children:

Chapter 101 - General Provisions

Chapter 105 - Age

Chapter 120 - Residence

Chapter 130 - Real Property

Chapter 140 - Personal Property

Chapter 150 - Income

Chapter 155 - Amount of Grant

Chapter 160 - Institutional Inmates

Chapter 170 - Relatives

Chapter 190 - Classification

Chapter 200 - Applications

Chapter 230 - Investigation and Decision

Chapter 350 - Continuing Services

The following Department Bulletins are also superseded by the Manual of Policies and Procedures - Aid to Needy Children:

> 379 349 386 366 387 373 373B Rev. 401 376

FILED

in the Office of the Secretary of State of the State of California

610-40 RECIPIENT OF PAYMENT OAS, ANB, APSB, ANC

610-40

Payments of security or aid shall be made directly to the grantee or authorized payee, except under certain conditions following death when the provisions of Secs. 611-00, Payment When Grantee Dies, and 611-10, Payments When Child Dies, shall be followed.

In OAS, ANB, and APSB, when a guardian is the payee, Summary of Letters of Guardianship (Form DPA 5) shall be on file with the SDSW. In ANB and APSB where the grantee is a minor and the guardian is the natural parent, letters of guardianship are not required. (See Sec. 626-60, Identification on Aid Pay Rolls.) The guardian's name shall appear on the pay roll together with the name of the grantee.

ANC payments shall be made to the person or institution providing care for the children on whose behalf the grant is made. If ANC is paid on behalf of children who are wards of the juvenile court, the payments may be made to the probation officer. If payments are made on behalf of a parolee from the California Youth Authority for whom the parole officer signed the application, the warrants shall be made payable to, and mailed to, the relative if the child is living with a relative eligible under the Social Security Act, or, if the child is living in a boarding home, the warrant shall be made payable to the boarding home mother and shall be mailed in care of the area office of the California Youth Authority. (See Sec. 628-00, Payees Eligible Under Social Security Act.) (W&IC 1556.5, 1557, 1560, 2140, 2183, 3075, 3460; FSS-Admin.)

610-50 IDENTIFICATION ON MARRANTS OAS, ANB, APSB, ANC 610-50

The payee's name shall appear on the warrant exactly as his signature appears on the application (Form Ag, Bl, CA 200), on the Summary of Letters of Guardianship (Form DPA 5) or, in ANC, on the latest Notice of Change (Form CA 232). (See Sec. 202-20, The Application Form.) Exception: In OAS and ANB if the county!'s disbursement procedures make it difficult to use the full first name, the initial only may be shown on the warrant.

The state number assigned to the case may appear on the face of the warrant for further identification. It shall be used with the name in all correspondence, reports, records, and other data regarding the warrant. (Walc 1560, 2140, 3075, 3460)

610-30 AUTHORIZATION FOR PAYMENT OAS, ANB, APSB, ANC

610-30

Action of the board of supervisors granting, restoring, increasing or decreasing assistance constitutes the final action which unconditionally authorizes payment to be delivered to the specified payees. Such action authorizes delivery of the payment immediately, except where a future date is specified. With respect to continuing grants, the first day of each month (as provided by law) is the effective date of the continuing authorization for payment.

Likewise, when aid is granted pursuant to an order of the SSWB (after a hearing on appeal), the action of the board of supervisors by which the SSWB's order is executed constitutes the final action which unconditionally authorizes payment to be delivered to the appellant. The SSWB, when ordering aid paid on an appeal, in effect remands the case to the board of supervisors who alone have the power to direct disbursement of funds from the county treasury.

The authorization is mandatory with respect to its execution, except where payment of aid is withheld or suspended because of a cloud on eligibility (See Sec. 361-30, Suspension Procedure.)

For the purposes of establishing the applicant's or recipient's accrued period of eligibility, and of computing the amount of payment due, the board of supervisors' authorization for payment of retroactive aid includes a determination of such retroactive period. (See Sec. 361-25, Retroactive Aid Payments by County.) This period, however, has no bearing on the effective date of the authorization for payment. (WAIC 1560, 2140, 2181, 3075, 3460)

611-95 REISSUANCE OF WARRANTS OAS, ANB, APSB, ANC 611-95

Whenever a warrant has been lost or destroyed before it is paid by the county treasurer, the amount due may be recovered by the payee by filing with the auditor prior to the time the warrant becomes void an affidavit setting forth the fact of the loss or destruction of the warrant, the number, date, amount, name of the payee, and all material facts relative to its loss or destruction. Upon the filing of the affidavit the auditor shall issue and deliver to the payee a duplicate warrant bearing the same date as the original warrant for the full amount of the original warrant and the treasurer shall pay the duplicate in lieu of the original warrant. The reissued warrant shall bear the same date as the original warrant and must be presented for payment within the same time limit set forth for the original warrant.

If ownership of the warrant had passed from the original payee to another person (bank, store, etc.) by endorsement prior to the time it was lost or destroyed, the amount due may be recovered by the legal owner of the warrant in the manner set forth above. In this event the county auditor shall issue and deliver the duplicate warrant to the legal owner instead of the original payee.

A warrant shall be considered lost if it has been mailed and has not been received by the addressee within twenty days after the date of mailing.

A warrant shall be considered to have been destroyed if it has been canceled in error by the county auditor. (Walc 1560, 2140, 3075, 3460; Government Code 29850, 29851, 29852, 29853)

612-00 FINANCIAL RECORDS FOR INDIVIDUAL CASES OAS, ANB, APSB, ANC

612-00

The following procedure is advised:

An individual account should be kept in the county for each recipient of aid. Such a record should include the name of the grantee and/or payee, the state case number, the amount of the grant, the effective date of the grant, all changes in the rates of aid, the effective dates of such changes, the dates of payment and warrant numbers. All payments should be posted to these accounts. Cancellations, collections, and other adjustments should be recorded.

These records should be filed in numerical sequence by state number. The issuance of warrants and payroll listings should follow the same order to facilitate posting. (WaIC 1560, 2140, 3075, 3460)

611-80 PAYMENTS MADE UPON ORDER OF THE SSWB OAS, ANB, APSB, ANC

611-80

Payment shall be made in the amount awarded and for the period designated by the order of the SSWB in cases of appeal. State participation is available in all such payments. Federal participation is available for retroactive payments in such cases for not more than two months immediately preceding the month in which the appeal is signed (see Sec. 325-20, Right, Purpose, and Scope of Appeal), except in APSB and certain ANC cases where there is no Federal participation. (See Sec. 325-90, Disposition of Case After SSWB Decision) (W&IC 1552, 1560, 2140, 2182, 3075, 3086, 3460)

611-90 TIME LIMIT ON PAYMENT OF AID WARRANTS OAS, ANB, APSB, ANC

611-90

Any warrant issued in payment of aid and payable to the recipient, or payable to the guardian, trustee, disbursing agent, or any custodian of the funds or estate of the recipient is void if not presented to the county treasurer for payment within six months after its date.

Every aid warrant shall carry notice of this fact conspicuously on its face in order that persons holding such warrants will present them for payment within the time limit specified. The following wording is recommended: "This warrant is void if not presented for payment within six months from date."

The warrant issue date shall not be counted in computing the last day of the six month period. If the last day falls on a Sunday or a legal holiday, the day following is considered to be the last day.

Any claim arising from a valid authorization to pay aid resulting in the issuance of an aid warrant becomes void on the same date as the warrant. (W&IC 2140, 3075, 3460; Gov. Code 29802, AGO 49/242)

Ti-1/022, (h. 2) Farl, Warren

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET 12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET, STREET 2

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND DIRECTOR Sacramento May 10, 1950

IN REPLY PLEASE REFER TO:

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Manual Letter No. 140.

These regulations were adopted by the State Social Welfare Board on April 21, 1950, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Section 103, and are being filed in accordance with Section 11380 of the Government Code.

The regulations contained in Manual Section 610-50 were adopted by the State Social Welfare Board to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

bottland

Charles I. Schottland

Director

468:65 Attachments FILED

in the Office of the Secretary of State of the State of California

Certified as a Regulation (or Regulations) of the

(Name of State Agency)
(Name of State Agency)
(Signature)
(Signature)
(Title)
(Title)
5-10-50
(Date)

1297-12 CHARLES I. SCHOTTLAND
Director
SECRETARY OF STATE

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K Street
Sacramento 14
May 9, 1950

MANUAL LETTER NO. 140

Sec. 610-50, Identification on Warrants, issued with Manual Letter No. 139 should have read as follows:

The payee's name shall appear on the warrant exactly as his signature appears on the application (Form Ag, Bl, CA 200), on the Summary of Letters of Guardianship (Form DPA 5) or, in ANC, on the latest Notice of Change (Form CA 232). (See Sec. 202-20, The Application Form.) Exception: In-OAS-and-ANB If the county's disbursement procedures make it difficult to use the full first name, the initials only may be shown on the warrant.

The state number assigned to the case may appear on the face of the warrant for further identification. It shall be used with the name in all correspondence, reports, records, and other data regarding the warrant. (W&IC 1560, 2140, 3075, 3460)

FILED
In the Office of the Secretary of State
of the State of California

MAY 1 0 1950

FRANK M. 100 DAN, Secretary of State

Certified as a Regulation (or Regulations) of the

Name of State Agency)

(Signature)

(Title)

5-3/-50 (Date) CHARLES I. SCHOTTLAND
Director

Governor

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

616 K STREET
SACRAMENTO 14
May 31, 1950

In the Office of the Secretary of State
of the State of California

MAY 31 1950

FRANK M. JORDAN, Secretary of State

DEPARTMENT BULLETIN NO. 418 (GEN)

TO: COUNTY WELFARE DIRECTORS

Subject:

Survey of Salaries and Working Conditions for Social Work Positions in Public Welfare Agencies

The Bureau of Public Assistance of the Federal Security Agency and the U. S. Children's Bureau have requested each state public welfare agency to cooperate in making a survey of salaries and working conditions covering social work positions. The information collected will be made available to the U. S. Bureau of Labor Statistics, which is conducting a similar survey in other public agencies and in private agencies in sample areas throughout the nation.

- l. Purpose of the Survey. The purpose of the survey is to provide factual information as a basis for improving standards of personnel administration and for making the best use of the present resources in planning and carrying out programs for staff training and development. The focus of the study is two-fold; first, to determine salaries and working conditions of personnel in social work positions; and second, to determine the educational background and the length and type of experience of such personnel.
- 2. General Plan of the Survey. A copy of the questionnaire to be used in the survey is attached. Each employee in a social work position shall fill out the questionnaire. It is estimated that the average amount of time required to complete the questionnaire should not be more than 15 or 20 minutes. A supply of the questionnaires will be furnished by the State Department of Social Welfare and sent directly to you on or about June 1.
- 3. Personnel to be Covered in Survey. Each employee engaged in a social work capacity (including county welfare directors, assistant county welfare directors, case supervisors, or others engaged in administrative or consultative social work positions) shall complete the questionnaire irrespective of the program or programs on which he works. This includes such programs as General Relief, Boarding Homes, Adoptions, Crippled Children's Services, etc.

4. Completion Date. The questionnaires for each county welfare department are to be completed and transmitted by each worker to the State Department of Social Welfare, Division of Personnel and Training, 616 K Street, Sacramento 14, California, not later than June 22, 1950.

Your cooperation in participating in this first nation-wide survey of personnel in social work positions will be greatly appreciated.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland

Director

Attachment

CONFIDENTIAL

SURVEY OF SALARIES AND WORKING CONDITIONS IN SOCIAL WORK POSITIONS

Bureau of Public Assistance and Children's Bureau, in cooperation with the Bureau of Labor Statistics, National Social Welfare Assembly, and National Council on Social Work Education

Name	e or identification number of employee		
NO	TE: Please answer all questions unless oth Circle only one item (code number) in		20 1 12 2 12 12 12 12 12 12 12 12 12 12 12
1.	Full-time or part-time social-work employe	e:	
	Are you employed full time (30 or more hours a wee If you answer "No," return this questionnaire with	k) i	n a social-work position? 1. Yes 2. Preplying to the remaining questions.
2.	Age on last birthday:		
	0. (Under 22) 2. (25-29) 4. (40-49)		6. (60-64)
	1. (22-24) 3. (30-39) 5. (50-59)		7. (65 or over)
•			
3.	Sex: 0. Male 1. Female		
4.	Color: 0. White 1. Negro 2. Otl		
T.	<u>Color:</u> 0. White 1. Negro 2. Oth	ler	
5.	Marital status:		
	Marital status: 0. Single—never married 1. Married		idowed, divorced, or legally separated
			idowed, divorced, or legally separated
	O. Single—never married 1. Married	2. W	
7.	O. Single—never married 1. Married Place of employment: Write in the name of the	2. W	y, county, and State in which your office
7.	O. Single—never married 1. Married	2. W	y, county, and State in which your office
7.	O. Single—never married 1. Married Place of employment: Write in the name of the is located. City (or town) Cour	2. W	y, county, and State in which your office
7. 9. <u>'</u>	O. Single—never married 1. Married Place of employment: Write in the name of the	2. W city	y, county, and State in which your office State engaged: Circle the type of social-work
7.	O. Single—never married 1. Married Place of employment: Write in the name of the is located. City (or town) Type of social—work program in which you as	2. W city	sngaged: Circle the type of social-work our agency as a whole.
7. 9.	O. Single—never married Place of employment: Write in the name of the is located. City (or town) Type of social—work program in which you as program in which you work rather than the program	2. W city ty re e of y E ON	state in which your office State Sta
7. 9. <u>:</u>	O. Single—never married 1. Married Place of employment: Write in the name of the is located. City (or town) Type of social—work program in which you as program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE	city_re e of y E ON 43.	sngaged: Circle the type of social-working agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic
7. 9. :	O. Single—never married Place of employment: Write in the name of the is located. City (or town) Type of social-work program in which you as program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 21. Child-welfare work—noninstitutional	city_re e of y E ON 43.	stateState
7. 9.	O. Single—never married Place of employment: Write in the name of the is located. City (or town) Type of social—work program in which you amprogram in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 21. Child—welfare work—noninstitutional (excluding court work with children)	city_re e of y E ON 43.	engaged: Circle the type of social-wor our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons)
7. 9. j	O. Single—never married Place of employment: Write in the name of the is located. City (or town) Type of social-work program in which you as program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 1. Public assistance 12. Family service, other than public assistance 21. Child-welfare work—noninstitutional (excluding court work with children) 22. Child-welfare work with children in institutions for dependent and neglected	2. W city	engaged: Circle the type of social-wor our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons) Institutional care of the aged
9.	O. Single—never married Place of employment: Write in the name of the is located. City (or town) Courtype of social-work program in which you amprogram in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 21. Child-welfare work—noninstitutional (excluding court work with children) 22. Child-welfare work with children in institutions for dependent and neglected or delinquent children	2. W city	engaged: Circle the type of social-work our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons) Institutional care of the aged Other services to individuals or familia
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9. :	Place of employment: Write in the name of the is located. City (or town) Courtype of social-work program in which you are program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 14. Child-welfare work—noninstitutional (excluding court work with children) 15. Child-welfare work with children in institutions for dependent and neglected or delinquent children 16. Court services for children 17. School social work (visiting-teacher work) 18. Rehabilitation service for the physically handicapped (including vocational rehabilitation)	2. W city	State State Engaged: Circle the type of social—wor our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons) Institutional care of the aged Other services to individuals or famili (specify service) Group work, recreation, or informal education (e.g. scouting, work in settlements, YM, YW, etc.) Service to communities and agencies
9. :	Place of employment: Write in the name of the is located. City (or town) Courtype of social-work program in which you are program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 14. Child-welfare work—noninstitutional (excluding court work with children) 15. Child-welfare work with children in institutions for dependent and neglected or delinquent children 16. Court services for children 17. School social work (visiting-teacher work) 18. Rehabilitation service for the physically handicapped (including vocational rehabilitation) 19. Mental-health services in mental-hygiene	2. W city	State State State Ingaged: Circle the type of social—wor our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons) Institutional care of the aged Other services to individuals or famili (specify service) Group work, recreation, or informal education (e.g. scouting, work in settlements, YM, YW, etc.) Service to communities and agencies through councils, sectarian coordinatin councils, community chests, and other
7.	Place of employment: Write in the name of the is located. City (or town) Courtype of social-work program in which you are program in which you work rather than the program IF YOU ARE ENGAGED IN MORE THAN ONE PROGRAM, CIRCLE 11. Public assistance 12. Family service, other than public assistance 14. Child-welfare work—noninstitutional (excluding court work with children) 15. Child-welfare work with children in institutions for dependent and neglected or delinquent children 16. Court services for children 17. School social work (visiting-teacher work) 18. Rehabilitation service for the physically handicapped (including vocational rehabilitation)	2. W city	engaged: Circle the type of social—wor our agency as a whole. LY THE ONE THAT OCCUPIES THE MOST TIME. Social work in a hospital (except menta hospital) or in a medical clinic Work with adult offenders (e.g. parole, probation, work within prisons) Institutional care of the aged Other services to individuals or famili (specify service) Group work, recreation, or informal education (e.g. scouting, work in settlements, YM, YW, etc.) Service to communities and agencies through councils, sectarian coordinatin

- bination of programs, circle the item that describes the combination of programs in which you are engaged.
 - 0. Work only on program circled in question 9
 - 1. Public assistance and child-welfare work
 - 2. Public assistance and any other services to individuals or families exclusive of child-welfare work
- Public assistance and any other services to individuals or families, including child-welfare work
- 4. Other combinations

30.	Total amount of education (including generators corresponding to MOST ADVANCED education. Include fields.	The state of the s						
	0. High school or less	4. Bachelor's degree only						
	1. Undergraduate college work of less than 2 years	5. Bachelor's degree and less than 1 year of graduate work						
	2. Undergraduate college work of 2 years or more, without a bachelor's degree	6. Bachelor's degree and 1 year or more of graduate work						
	3. 2 or 3 year undergraduate course from which you received R.N., LL.B., or other degree	7. No bachelor's degree but some graduate- level courses						
31.	Field of concentration in undergraduate co	ollege work: Indicate the ONE field in which						
	you have the most undergraduate education.							
	0. No college work	5. Undergraduate social work						
	1. Psychology	6. Nursing or premedical						
	2. Other social sciences	7. Recreation or physical education						
	3. Education 4. Home economics	8. Other (specify)						
32.	Field of concentration in graduate courses the most graduate-level courses.	3: Indicate the ONE field in which you have						
	O. No graduate courses	5. Social work						
	1. Public administration	6. Law						
	2. Psychology	7. Theology						
	3. Other social sciences 4. Education	8. Recreation or physical education						
	4. Education	9. Other (specify)						
33.	Amount of education in graduate schools of graduate schools of social work REGARDLESS OF WHET	THER YOU HAVE A BACHELOR'S DEGREE.						
	0. No work in graduate school of social work	3. More than 1 but less than 2 academic years						
	1. Less than 1 academic year 2. 1 academic year	4. 2 or more academic years						
NOT	TE: Answer questions 34-38 only if you have social work.	ve had courses in a graduate school of						
34.	Type of graduate social-work education: Ca	ircle the number which describes how you took						
	your graduate social-work education.							
	0. Part-time study only							
	1. Full-time study only 2. Combination of part-time and full-time study							
35.	Supervised field work during study in grad	duate school of social work:						
	0. No supervised field work							
	1. Supervised field work of 350 clock hours or les 2. Supervised field work of more than 350 clock ho	가장 1이 18 분야 있는 걸리 이 마양 20 10 10 10 10 10 10 10 10 10 10 10 10 10						
36.	Placement in supervised field work in graduate school of social work: Indicate the ONE field in which you had your most advanced field-work placement.							
	0. No supervised field work 1. Medical social work	5. Child welfare						
	2. Psychiatric social work	6. School social work (visiting-teacher work)						
	3. Family welfare	7. Group work 8. Community organization						
	4. Public assistance	9. Other (specify)						
37.	Degrees in a graduate school of social wor	k:						
	0. Some work in graduate school of social work	2. Degree, certificate, or diploma for 2						
	but no degree, certificate, or diploma 1. Degree, certificate, or diploma for 1 academic	academic years of work or their equivalent						
	year of work or its equivalent	3. Doctorate						
38.	Use of public funds for study in graduate public funds to help finance your graduate work in received.	school of social work: If you received a social work, indicate the type of funds						
	O. No public funds used	4. Public welfare funds only (other than FERA						
	1. GI educational benefits only	and rederal child-welfare-service funds)						
	2. FERA funds only	5. Federal child-welfare-service and other public welfare funds						

6. Other combinations or other public funds

3. Federal child-welfare-service funds only

Certified as a Regulation (or Regulations) of the

Dept. of Social huger (Name of State Agency)
(Name of State Agency)
(Signature)
(Title)
(Title) 5-31-50
(Date)

Tex 10 -3, 103.5, 114 6, 2140

CHARLES I. SCHOTTLAND
Director

GOVERNOR

STATE OF CALIFORNIA In the Office of the Secretary of State DEPARTMENT OF SOCIAL WELFARE of the State of California

616 K STREET SACRAMENTO 14

May 31, 1950

DEPARTMENT BULLETIN NO. 417 (OAS)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

MAY 3 1 1950

At 5 o'clock M.

FRANK M. JORDAN, Secretary of State

By Collins Sand

Subject: Old Age Security

Authorization Procedure

Pending adoption of amended authorization forms for Old Age Security, the use of Form Ag 201, Certificate of Verification of Eligibility, and Form Ag 232, Notice of Change, shall be continued for all actions by the board of supervisors relating to payments for March 1950 or subsequent months. (Payment for months prior to March 1950 shall be continued to be authorized by the welfare director, acting in the capacity of deputy director, State Department of Social Welfare, as outlined in Bulletin 388 D.)

Effective immediately it will be necessary to record certain additional information on the existing Form Ag 201 and Form Ag 232 in order that the counties' claims for state and federal participation will be accurate.

I. Form Ag 201 (New Cases and Reapplications)

On Forms Ag 201 prepared after the receipt of this bulletin the following information shall be recorded.

A. Non County Status

If an applicant has less than one year of residence in the county as of the beginning date of aid, the box in the upper right hand corner of Form Ag 201 shall be checked and the future date on which county participation will begin shall be entered immediately below.

B. Non Federal Status

If for any reason no federal participation is available in the payment authorized for specific months, the specific period for which payment is to be claimed "non-federal" shall be noted on Form Ag 201. For instance, there is normally no federal participation in retroactive initial payments (payments for months prior to that month in which the board of supervisors grants an application). "Non-federal for months prior to month of B/S action," or some other appropriate statement, must be recorded. It is suggested that the available space immediately under Item 16 be used to record the statement regarding non-federal status.

II. Form Ag 232 Notice _ Change

On all forms Ag 232 prepared after receipt of this bulletin the following additional information shall be recorded.

A. Old Rate

When aid is decreased or increased the new rate is always entered in Section 1, Column (3). Pending revision of the present Form Ag 232 the amount of the existing authorization for continued payments (old rate) shall be recorded. Likewise when aid is discontinued it will be necessary to record the amount of the grant which is being discontinued.

The available space in Section I, Column (1) shall be used to record the old rate unless the county has printed its own Form Ag 232 and has already made provision for recording the "old rate" elsewhere on the form.

The effective date of an increase recorded in Section I may be a month(s) for which the recipient has already received a payment. If the existing authorization, i.e., the "old rate" as entered in Column (1) was not in effect during all months for which additional payment is being granted it is necessary to record the amount already paid (old rate) for each past month for which a retroactive or supplemental payment is to be paid.

The space provided under "Reason for Change" should be used to record this information for past months.

B. Non County Status

If the recipient has not yet acquired one year of residence in the county, "non-county" status shall be designated in the space above the state number in the upper right hand corner. Exception: This is not necessary if the county has a central control file on non-county cases which renders such designation unnecessary.

C. Non Federal Status

If for any reason no federal participation is available in the payment authorized for specific months, the specific period for which payment is to be claimed "non-federal" shall be noted under "Reason for Change."

III. Determination of Federal Participation Status*

Determination as to non-federal status shall be made in accord with the provisions of Manual Section 627-30, Federal Participation, and Section 610-75, Payment to Patients on Leave from State Hospitals. (The latter section specifies that there is no federal participation if the guardian of the estate is an official of the State Department of Mental Hygiene.)

There are two circumstances under which the county shall make adjustments in relation to participation already claimed.

^{*}A new chapter for the Old Age Security Handbook entitled "Federal Participation" is being prepared and will be released in the near future.

1. Discontinuance Because of Hospitalization

Recipients who enter a public hospital for medical or surgical care receive aid for two calendar months after date of admission. (See Manual Section 164-10, Eligibility During Hospitalization.) Under certain circumstances federal participation is not available for the second calendar month following the date of admission to a public hospital (see Manual Section 627-30, Hospitalization).

If on a discontinued case federal participation has already been claimed in the payment for the second calendar month, but payment should have been claimed on a non-federal basis, the county shall adjust the payment for that month to a non-federal basis on a subsequent claim.

2. Conditional Restoration Following Discontinuance Because of Employment (See Manual Section 361-22, Investigation of Conditional Restoration

If aid is "conditionally" restored, all payments shall be claimed non-federal.

If the board of supervisors finds the recipient (for whom conditional payment has been authorized) to be eligible, and the board action making this determination occurs before the end of the second month following that in which aid was "conditionally" restored, the county shall retroactively claim federal participation from the first of the month in which aid was authorized "conditionally."

If the second action of the board of supervisors is later than the second month following that in which aid was "conditionally" authorized the county shall claim federal participation beginning with the month in which the board of supervisors took their second action.

IV. Submission of Individual Case Documents to the State Department of Social Welfare

Effective immediately, the county shall send the State Department of Social Welfare, 616 K Street, Sacramento, only the following forms relating to the individual Old Age Security cases.

Ag 232, Notice of Change

- (1) For Old Age Security Sample Cases (State case number ends in 22, 44, 66 or 88) report of all actions, i.e., increase, decrease, discontinuance (including death), restoration.
- (2) For all other Old Age Security cases report of discontinuance for reasons other than death, except that counties shall continue to send to the State Department of Social Welfare Forms Ag 232 on all discontinuances due to death on which the board action occurred prior to June 1, 1950. Discontinuances due to death on which board action occurs on or after June 1, 1950, will be reported by summary count on the Old Age Security monthly statistical report, Ag 237. (See Department Bulletin No. 339-C).

Ag 251, Old Age Security Permanent Sample Schedule on all cases in which the state case number ends in 22, 44, 66, or 88. Pending revision of Form Ag 251 this form shall be accompanied by a completed form Temp 302 Ag, Old Age Security Eligibility Analysis. (See Department Bulletin 405.)

ABC 808, Report of Repayment (See Department Bulletin No. 416)
DFA 112, Report - Section 2223, W&IC Code.
The following is a summary of forms relating to individual cases which are no longer required to be sent to the State Department of Social Welfare. (A copy shall be filed in the individual case record.)

- Ag 200, Application for Old Age Security
- Ag 200B, Application by Authorized Representative of Applicant
- Ag 201, Certificate of Verification of Eligibility
- Ag 232, Notice of Change, except for discontinuances and Old Age Security Permanent Sample cases as specified above.
- AB 204, Applicant's Affidavit of Intent as to Residence
- AB 215, Notification of Transfer
- AB 216, Recipient's Affidavit of Residence
- AB 231, Certificate of Delivery of Payment of Aid
- AB 235, Certification from State Department of Mental Hygiene of Applicant's Release from State Hospital.

Very sincerely yours,

Sharles I Schottland

Charles I. Schottland
Director

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Title) (Date)

WH 10103,103.5, 1148,

CHARLES I. SCHOTTLAND Director

GOVERNOR

STATE OF CALIFORNIA

FILED

DEPARTMENT OF SOCIAL WELFARETHE Office of the Secretary of State of the State of California

616 K STREET

SACRAMENTO 14 May 31, 1950

MAY 31 1950

DEPARTMENT BULLETIN NO. 416 (Fiscal)

TO: COUNTY WELFARE DIRECTORS
COUNTY AUDITORS
COUNTY BOARDS OF SUPERVISORS

Subject: Accountability for Aid
Payments -- OAS

FRANK M. SORDAN, Secreta

The Director of the State Department of Social Welfare, in addition to his responsibility for state funds, is accountable to the Federal Government for

aid payments made by the counties and certifies as to their validity and accuracy.

For the Director so to certify he must have current knowledge that the amounts of state and federal funds claimed are correct and in agreement with individual awards to recipients as determined by county boards of supervisors. It is the responsibility of the counties to administer the Old Age Security Law and, hence to maintain records and procedures assuring the correctness and validity of claims to the state. Therefore, to provide one of the means necessary to fulfill this responsibility the following regulations, effective with the July 1950 OAS claims, are hereby established:

- 1. Each county shall submit with its monthly claim to the State Department of Social Welfare a reconciliation statement in duplicate (see Form Ag 820, Reconciliation Statement attached). By means of summary totals this statement shall demonstrate that the amount of aid payments claimed each month equals the sum of the amount of continuing aid authorized for the previous month and the net amount resulting from the actions of the Board of Supervisors in initiating, modifying or discontinuing the aid which actions are given effect during that month. Reconciling items, if any, shall be identified on the statement and are subject to adjustment on the claim of a subsequent month.
- 2. Each county shall maintain in an auditable manner and conveniently accessible to State and Federal auditors the following records:
 - a. A register, or its equivalent, supporting the Reconciliation Statement and summarizing the money effect of actions taken by its Board of Supervisors in initiating, modifying, or discontinuing aid. The State Department of Social Welfare recommends the use of Form Ag 822, Register of Authorizations, to accomplish this purpose (see sample form attached), as being applicable to most counties.

- b. In addition to the copies of Forms Ag 201, Certificate of Eligibility, and Form Ag 232, Notice of Change, now required to be filed in the individual case record (see Department Bulletin 417) each county shall maintain a file of authorization documents (Forms Ag 201 and 232) filed chronologically in batches according to Board action date. Each batch may be further divided by type of action; viz: (1) New cases and restorations (2) Increases, (3) Decreases, (4) Discontinuances. Individual documents shall be filed in case number order within each batch or groupings. With each batch shall be filed a recapitulation of the money effect of the documents included in it. This may be in the form of a listing or some other type of recapitulation suitable to the individual county. It shall, however, identify the individual cases entering into the summary totals. Form Ag 821, Batch Voucher, (see sample attached) is recommended as being applicable to most counties. The totals on each Batch Voucher are entered in the Register of Authorizations (or its equivalent) referred to in paragraph a above.
- c. Upon completion of post audit by State and Federal auditors the State Department of Social Welfare will authorize the destruction of the Forms Ag 201 and Ag 232 required to be filed chronologically in batches in paragraph b, above. This authorization will cover such forms for a fiscal year and will ordinarily be given with submission to the county of the formal audit report for the closing period of that fiscal year.

The practice of lining of items from the OAS claim payroll, as required in Manual Section 628-05, shall be discontinued. All warrants issued are to be reported on the payroll and on the aid affidavit in gross. A warrant is considered to be issued and is counted as a payment even though held or suspended until cancellation has been effected by the county auditor. All cancellations of warrants for the current month as well as for prior months are to be reported in full on the Schedule of Cancelled Warrants, Form ABC 804. Mutiliated and voided warrants which are replaced by identical new warrants of like number, amount, and date are not "cancellations" as the term is used here.

Forms ABC 808, Notice of Repayment, shall be forwarded to the State Department of Social Welfare as heretofore excepting that instead of being forwarded on a flow basis they shall be submitted with the monthly claim to which they apply and shall be listed on Form ABC 803, Schedule of Repayments (formerly Report of Adjustments).

Each county has the responsibility of reporting in its claims to the State the correct participation status (Federal and State shares) of each aid payment claimed. It also has the responsibility of reporting corrective adjustments in participation for aid payments claimed in previous months. Heretofore the State Department of Social Welfare, in its pre-audit of claims based on documents submitted by the counties, has in most instances prepared and effected these adjustments. Since individual documents (Forms Ag 201 and 232) are no longer to be submitted by the counties for audit purposes (on submission of Form Ag 232 for statistical purposes, see Department Bulletin No. 417) the State will not be able to make these adjustments. Therefore, each county shall maintain control files to assure that changes in Federal, State, and county shares are reported in the correct amounts at the proper time. Each county shall maintain for examination by State and

Federal auditors auditable records filed by claim month which show the reasons for the changes in participation effected on the claim. To this end, the State Department of Social Welfare will develop recommended control forms and procedures, and will assist in establishing them.

The procedure and use of forms outlined herein effective July 1, 1950, is for the present, applicable to the OAS program only. Detailed instructions for preparation and use are given on the reverse side of the forms. A supply may be ordered from the State Department of Social Welfare in the usual manner. Until further notice claims and individual documents for ANB, APSB, and ANC assistance payments shall be submitted to the State Department of Social Welfare in accordance with previously authorized procedure.

Very sincerely yours,

Charles I. Schottland

Director

RECONCILIATION STATEMENT BOARD AUTHORIZATIONS TO AUDITOR'S PAYMENTS AS CLAIMED TO SDSW OLD AGE SECURITY

Coun	w	Month of Claim , 19
1.	Continuing Aid Payments (Item 7 of the Reconciliation Statement of the Previous Month)	
2.	Add new Aid Payments Authorized for this month (all new cases and restorations)	
3.	Add the net amount of Increases in Continuing Aid Pay- ments Authorized to be paid this month	
4.	Sub-total (Item 1 plus Items 2 and 3)	
5.	Subtract all Aid Payments Authorized to be discontinued at the close of the previous month	
6.	Subtract Decreases in Continuing Aid Payments Authorized to become effective this month	and the second s
7.	Net Amount of Continuing Aid Payments Authorized for this month (Item 4, less Items 5 and 6)	
8.	Add the net amount of Aid Payments Authorized to be paid this month for prior months	
	Total Aid Authorized to be paid during this month (Item 7 plus Item θ)	
10.		
	(a) Cancellations for current month (optional)	
	(b) Cancellation for prior months	
11.	Subtract the gross amount (including County Share) reported on Form 803 as Repayments of Aid	
12.	Sub-total (Item 9 less Items 10 and 11)	
13.	Add or subtract the gross amount of adjustments on claims for prior months (From Form 805)	
14.	Net amount claimable for this month (Item 12 plus or minus Item 13)	
15.	Net amount claimed on Aid Affidavit for this month	
	(a) Federal Share	
	(b) State Share	
	(c) County Share	
16.	Difference, if any, between Item 14 and the sum of Items 15 a, b and c. Explain any difference below or on a separate sheet	
	A Company of the Comp	
	The second of the second of the second of	
_		
	CERTIFICATION	
	ereby certify that the amounts stated herein are true and co ords conveniently accessable in the county.	rrect and are property supported by auditable
	Signed:	
	Title:	
	Date:	, 19
	ed construint and the second process and the second	

INSTRUCTIONS

Enter the heading the County Name and the Month of the Claim. The body of the form is completed as follows:

- Item 1. Enter the amount of the continuing aid payments authorized by the Board of Supervisors for the previous month. This will be the same figure as stated in Item 7 of the previous month's reconciliation statement unless there has been error in amounts previously reported. Any correction of a previous error is to be fully explained on a separate sheet. (For the Month of July, 1950 the amount to be entered in Item 1 is the amount stated in Line 1, Column A of the Aid Affidavit (Ag 800) for June, 1950).
- Item 2. The amount to be entered here will include all authorized new cases and restorations (both regular and conditional) which have been given effect by issue of warrants during the month of the claim. If the Board authorized any items for the month which could not be effected by issue of warrants until the next month such items are to be included in Item 8 of the next month's reconciliation statement. Ordinarily this will be controlled at the time Batch Vouchers are made up, as a voucher should include only actions to be taken in a specific month.
- Item 3. The same rule applies here as for Item 2. Include only increases which have been given effect by change of the continuing aid payments. Do not include supplemental payments for prior months. These are to be included in Item 8.
- Item 4. Sub-total. Item 1 plus the sum of Items 2 and 3.
- Item 5. Enter the amount of all discontinuances authorized to become effective on the last day of the previous month.
- Item 6. Enter the net amount of all decreases authorized to become effective on the first day of the month of claim.
- Item 7. The net difference between Item 4 less the sum of Items 5 and 6. This figure is the amount of the continuing aid payments for the month being claimed.
- Item 8. Enter the net amount of all supplemental and initial aid payments made this month for prior months.
- Item 9. Item 7 plus Item 8. This figure represents the amount of aid authorized to be paid in the month being claimed which should have been given effect by the auditor through issuance and cancellation of warrants during the month.
- Item 10. Enter the respective gross amounts (including county shares) of warrant cancellations; for current month; (a) prior months (b) and statutory (c) as reported for the month in Column 5 of Form ABC 804, Schedule of Warrants Cancelled. The use of Item (a) is optional.
- Item 11. Enter the gross amount (including county shares) of repayments of aid as reported for the month in Column 4 of Form ABC 803, Schedule of Repayments.
- Item 12. Sub-total (Item 9 less the sum of Items 10(a), 10(b), 10(c) and 11.)
- Item 13. Enter the net amount (plus or minus) of adjustments for prior months as reported on Form ABC 805, Schedule of Adjustments for the month. This figure is the net change in total grants. Do not include adjustments between Federal, State and County shares where the total grant is not affected. Example A: An adjustment is made correcting a grant previously claimed from \$75.00 to \$60.00. Enter \$15.00. Example B: An adjustment is made for an item previously claimed changing from non-federal to federal, but not affecting the total grant. Make no entry.
- Item 14. Enter here the amount in Column 12, plus or minus amount in Column 13.
- Item 15. Enter in a, b and o the Federal, State and County shares as reported for the month on Form Ag 800, Aid Affidavit.
- Item 16. Enter the difference (plus or minus) between the amounts stated in Item 14 and the sum of the amounts in Items 15(a) (b) and (c). If the claim has been correctly prepared in accordance with Board Authorizations this figure should be zero. If there is a difference explain reconciling items in detail below the item or on a separate sheet. If there has been no error in recording Board Authorizations in the Register of Authorizations (or its equivalent) any difference is in the claim itself (aid affidavit or its supporting payrolls and schedules).

REGISTER OF BOARD AUTHORIZATIONS OLD AGE SECURITY

Month , 195____

	Boses	CONTINUING AID PAYMENTS				Name Barrana	TOTAL AUTHORIZED		
BATCH Number (1)	BOARD ACTION DATE (2)	New Cases	Increases (4)	Discontinuances (5)	Decreases (6)	NET Totals (7)	NET PAYMENTS FOR PRIOR MONTHS (8)	AUTHORIZED CHANGE IN AID PAYMENTS (9)	NOTATIONS (10)
	**************************************				•				
TOTAL	LS								

Form Ag 822, May 1950

INSTRUCTIONS

ENTER IN HEADING THE MONTH OF CLAIM, THAT IS THE MONTH IN MHICH THE CHANGES AUTHORIZED ARE TO BE EFFECTED BY THE COUNTY AUDITOR. COMPLETE THE BODY OF THE FORM AS FOLLOWS:

- COLUMN 1. ENTER THE BATCH VOUCHER NUMBER. INCLUDE ALL BATCH VOUCHERS WHICH ARE TO BE GIVEN EFFECT BY THE COUNTY AUDITOR DURING THE MONTH SHOWN IN THE HEADING.
- COLUMN 2. ENTER THE BOARD ACTION DATES SHOWN IN THE HEADING OF EACH BATCH VOUCHER.
- COLUMN 3 THROUGH COLUMN 9. ENTER FROM THE BATCH VOUCHERS SHOWN IN COLUMN I THE TOTALS OF THE CORRESPONDINGLY NUMBERED COLUMNS OF EACH VOUCHER.

TOTAL AND CROSS PROVE ALL COLUMNS. THE TOTALS OF COLUMNS 3 THROUGH 9 SHOULD BE THE SAME AS THE AMOUNTS SHOWN IN ITEM 2 THROUGH 9 OF FORM 820, RECONCILIATION STATEMENT.

BATCH VOUCHER OF INDIVIDUAL BOARD AUTHORIZATIONS OLD AGE SECURITY

	VOUCHER	NO.		
ION DATE			. 195	

, 195____ BOARD ACTION MONTH TO BE CLAIMED_ CONTINUING AID FAYMENTS PAYMENTS NET GRANT DECREASES (6) FOR PRIOR MONTHS (8) GRANT
DISCONTINUANCES
(5) TOTAL NET NET TOTALS (7) AID EFFECTIVE DATE (2) CASE NEW GRANT AUTHORIZED (9) CASES (3) INCREASES (4) NUMBER (1) TOTALS

INSTRUCTIONS

Enter in heading the Batch voucher number. Vouchers should be numbered chronologically from July 1, 1950, Number I being the first board approval in that month. Enter board action date and the month in which the documents listed are to be reflected in a claim to the State Department of Social Welfare. Complete the body of the form as follows:

- COLUMN 1. ENTER THE STATE CASE NUMBER IN CASE NUMBER ORDER IF POSSIBLE.
- COLUMN 2. ENTER THE EFFECTIVE DATE OF THE ACTION AS SPECIFIED ON FORM 201 OR 232.
- COLUMN 3. ENTER THE AMOUNT OF THE GRANT FOR ALL NEW CASES AND RESTORATIONS, BOTH REGULAR AND CONDITIONAL.
- COLUMN 4. ENTER THE AMOUNT OF NET GRANT INCREASES. EXAMPLE: IF GRANT INCREASED FROM \$60.00 to \$70.00, ENTER \$10.00.
- COLUMN 5. ENTER THE AMOUNT OF GRANTS BEING DISCONTINUED AT THE CLOSE OF THE PREVIOUS MONTH.

 EXAMPLE: A GRANT OF \$70.00 IS DISCONTINUED ON JULY 31. ENTER \$70.00 IN A BATCH VOUCHER

 TO BE CLAIMED IN AUGUST.
- Column 6. Enter the amount of net grant decreases. Example: If grant decreased from \$75.00 to \$60.00, enter \$15.00.
- COLUMN 7. ENTER THE NET TOTALS OF COLUMNS 3, 4, 5 AND 6.
- Column 8. Enter the net amount of all payments for prior months. Example 1: In August a grant is increased retroactively to July 1st from \$60.00 to \$70.00, enter \$20.00 in a September Batch Voucher. Example 2: In August a new grant is authorized retroactively to July 1 in the amount of \$75.00. Enter \$150.00 in a September Batch Voucher.

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COLUMN 9. ENTER THE SUM OF COLUMNS 7 AND 8.

AND DE EN MONTH.

Certified as a Regulation (or Regulations) of the (Name of State Agency) (Title) (Date)

MANUAL UNIT

1297-1299
CHARLES I. SCHOTTLAND
DIRECTOR
SECRETARY OF STATE

1146, 118.2

EARL WARREN GOVERNOR

State of California
DEPARTMENT OF SOCIAL WELFARE
616 K Street
Sacramento 14
May 8, 1950

FILED
In the Office of the Secretary of State
of the State of California

DEPARTMENT BULLETIN NO. 415 (FISCAL)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DIRECTORS
COUNTY AUDITORS

MAY 31 1950

FRANK M, JORDAN, Secretary of State

Subject:

Revision of Manual Section 610-50 Identification on Warrants

Chapter 37, Statutes of 1950, First Extraordinary Session adds Section 118.2 to the Welfare and Institutions Code to read:

"Notwithstanding any provisions of Sections 29300 and 29805 of the Government Code, warrants payable to recipients of old age security, aid to the needy blind, aid to partially self—supporting blind residents, or aid to needy children shall not include any word or abbreviation indicative of aid, assistance, charity, needy, support, or welfare. Nothing in this section prohibits the use of code numbers or other code symbols used and understood by county officers and agencies to identify the purpose and liability for which such warrants are drawn, if such code numbers or other code symbols are not generally so understood by the public.

"The State Department of Social Welfare may make such rules and regulations concerning the contents of such warrants as may be necessary to carry out the provisions of this section."

In accordance therewith, the following addition is made to Section 610-50 of the Manual of Policies and Frocedures, effective July 15, 1950:

Warrants drawn in payment of OAS, ANB, APSB, and ANC shall not carry any reference to indigency or pauperism and shall not include any word or abbreviation indicative of aid, assistance, charity, needy, support, welfare, or words or abbreviations of similar connotation. The program titles Old Age Security, Aid to Needy Blind, Aid to Partially Self-supporting Blind Residents, and Aid to Needy Children and the abbreviations OAS, ANB, APSB, and ANC shall not appear on the warrant nor shall the fund designation appear on the warrant if it includes such words as welfare, security, relief, indigent, etc.

For identification purposes within the county government such warrants may carry a code letter or number provided such code is not generally understood by the public. The following codes are recommended:

A - Old Age Security

B - Aid to Needy Blind

P - Aid to Partially Self-supporting Blind Residents

C - Aid to Needy Children

If case numbers are written on the warrant by typewriter or other mechanical process, such numbers may include the program suffix as Ag for OAS, Bl for ANB and APSB, and Ca for ANC.

It may also be helpful to use warrants of different colors or tints for the various programs such as buff for OAS, green for ANB and APSB, and blue for ANC.

Very sincerely yours,

Charles I. Schottland

Charles I Schottland

Director

Certified as a Regulation (or Regulations) of the (Name of State Agency) (Title)

(Date)

CHARLES I. SCHOTTLAND Director UN 10103, 103.5, 1142, 2142 WARREN GOVERNOR

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K Street
Sacramento 14
April 27, 1950

FILED
In the Office of the Secretary of State
of the State of California

DEPARTMENT BULLETIN NO. 414 (OAS)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

MAY 3 1 1950

FRANK M. JORDAN, Secretary of State

Subject: Old Age Security Forms

Policy adopted by the Social Welfare Board in relation to personal property holdings will require revision of certain Old Age Security forms. Revised forms will be printed as soon as possible. Meanwhile the present supply is to be used but the following corrections or additions are to be made on forms as follows:

- Ag 200 Application for Old Age Security. Before the form is signed by the applicant make the following changes in item 7: Strike out "fifteen" and (\$1500) and insert "twelve" and (\$1200).
- Ag 206 Recipient's Affirmation of Eligibility for Old Age Security. Before the form is signed by the recipient make the following correction in the 7th paragraph which relates to personal property holdings. Strike out "fifteen" and (\$1500) and insert "twelve" and (\$1200).

County Report of Eligibility Investigation (reverse of form). Item 2, Personal Property: Record the verified amount of the recipient's separate personal property and his share of community property. If the spouse with whom the recipient is living is receiving OAS, so state and also record the verified amount of combined personal property owned by the couple. Record the source of the verifications and the dates thereof. (These instructions supplement Manual Section 352-15).

If the results of re-investigation are recorded in the case record in lieu of recording on the reverse of Form Ag 206 (Manual Section 352-15) such recording shall include the information specified immediately above.

Very sincerely yours,

Charles I. Schottland
Director

Certified as a Regulation (or Regulations) of the (Name of State Agency) (Title)

(Date)

TUY 10 103, 103.5, 103.6, 1146 2140, 3075 EARL WARREN FILED In the Office of the Secretary of State of the State of California

CHARLES I. SCHOTTLAND Director

> STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE 616 K Street

Sacramento 14 May 29, 1950

DEPARTMENT BULLETIN NO. 404A (OAS. ANB)

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS

Utilization of Real Property Subject: as a Resource--OAS, ANB

Section "B" of Department Bulletin 404 is revised as follows:

B. Real Property Used as a Reserve

For the purpose of this section it shall be considered that the market value of real property other than the home is double the county assessed value. Encumbrances of record shall be deducted from the market value to determine the net value.

Person is Single, Divorced, Widowed, Separated or is Living With a Spouse Who is Not an Applicant for or Recipient of the Same Category of Aid

When the net market value of the applicant's or recipient's interest in real property other than his home together with the value of all personal property owned does not exceed \$1200, such real property may be retained as a reserve which the applicant or recipient may use to meet the common contingencies of life provided total real property holdings are within the statutory maximum. (See Department Bulletins 412, Item A, I and 413, Item A, I.)

An applicant for OAS resides with his spouse Example: who is not yet old enough to qualify for OAS. Their only personal property is community property the value of which is \$1800 or \$900 each. In addition to their home which is community real property the applicant owns as his separate property a vacant lot the net market value of which is \$250. The county assessed value of combined real property holdings is within the \$3500 statutory maximum and since the net value of the applicant's lot together with his \$900 share of personal property is less than \$1200 he is permitted to retain the lot as a reserve.

2. Married Person Living With a Spouse Who is an Applicant for or Recipient of the Same Category of Aid

Provided total real property holdings are within the statutory maximum, real property other than the home may be retained as a reserve with which to meet the contingencies of life if:

a. The value of the applicant's or recipient's personal property together with his share of the net value of real property other than the home does not exceed \$1200,

and

b. The value of the combined total personal property holdings of the applicant or recipient and his spouse together with the total net value of real property other than the home does not exceed \$2000. (See Department Bulletins 412, Item A, II, and 413, Item A, II.)

Example: A married couple, living together, both apply for ANB. Investigation established personal property holdings as follows:

> \$ 500 bank account (community) 1200 value of bonds (community) 200 bank account (her separate property) \$1900 Total personal property holdings

The man's share of this property is \$850 and the woman's share of community property plus her separate property is \$1050. From a personal property standpoint each of the couple is eligible. The couple owns no real property except a vacant lot, the woman's separate property, which has a net market value of \$100. This lot may be retained by the woman as a reserve as the value of the lot together with her share of personal property does not exceed \$1200 (\$1150) and the value of the lot together with the combined personal property holdings of both spouses is just \$2000 (\$1900 plus \$100). (If the market value of the lot had been more than \$100, she would be required to utilize it as a resource as provided in Section C below,)

Very sincerely yours,

Charles I. Schottland

Director

Certified as a Regulation (or Regulations) of the

(Wame of State Agency) (Signature) (Date)

W+10 103, 1146, 2160. 7 Governor

CHARLES I. SCHOTTLAND

State of California DEPARTMENT OF SOCIAL WELFARE 616 K Street Sacramento 14 May 3, 1950

FILED in the Office of the Secretary of State of the State of California

TO: COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS COUNTY AUDITORS

DEPARTMENT BULLETIN NO. 372-B (OAS, ANB)

MAY 31 1950

Payment to Counties for Subject: Institutional Care of Former Recipients of OAS and ANB

Welfare and Institutions Code Sections 2160.7 and 3044.1 were amended effective March 1, 1950, by Chapter 32, Statutes 1950, First Extraordinary Session. Beginning March 1, 1950, the amended sections provide for payment of institutional subvention in the amount of \$35.20 per month, or portion of a month, for all former recipients of Old Age Security and Aid to Needy Blind (Aid to Partially Selfsupporting Blind Residents excluded) entering a county institution for medical, hospital, or infirmary care at county expense provided:

- 1. The individual was eligible to and receiving aid on the date of admission to the county institution (any subsequent change in eligibility status is irrelevant).
- 2. The individual has been continuously confined in the institution and two calendar months since date of admission have elapsed.
- 3. There is on file in the county a certification of the superintendent or other official of the institution that the former recipient received care in the institution during each month for which a claim is filed.

"County Institution" includes a private hospital which, pursuant to contract with the county, accepts patients for medical, hospital or infirmary care at county expense.

Subvention shall be claimed by the county rendering the care irrespective of the former recipient's residence status except when such care is given under a contractual agreement between two counties in which case the claim shall be filed by the county paying for the care rendered.

PROCEDURE FOR FILING CLAIMS

One claim for each calendar quarter shall be filed with the State Department of Social Welfare, 616 K Street, Sacramento, for each program, Old Age Security and Aid to Needy Blind.

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MAY 3 1 1950

FRANK M. JORDAN, Secretary of State

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The quarterly claim shall be submitted in duplicate and shall indicate by an "X" in the proper column on Form AB 801 H (revised November 1949), each month for which subvention is being claimed for each former recipient. The total number of persons shown for each month on Form AB 801 H is carried forward to the Affidavit, Form AB 800 H (revised November 1949), on which the total amount of subvention claimed is computed. (Another revision of Form AB 800 H providing for the new amount of \$35.20 will be released before the claims for the quarter ending June 30, 1950, are due.)

Bulletin 372-A remains in effect for claims covering months prior to March 1950. Therefore, on claims for the quarter ending March 31, 1950, \$27.50 per month or portion of a month should be claimed for January and February, and \$35.20 for March. On the Affidavit, Form AB 800 H (revised November 1949), Item 3 should be changed to "Total for 3rd month, No. persons x \$35.20."

Supplemental claims for prior months subsequent to September 30, 1949, shall be listed at the end of the claim for the current quarter, and the month(s) for which each claim is made shall be clearly indicated. The number of persons on the supplemental claims shall be added separately on the claim, Form AB 801 H (revised November 1949), and carried forward to the affidavit, Form AB 800 H, in the appropriate item.

Supplemental claims for months prior to October 1949 shall be submitted separately on Forms AB 800 H and AB 801 H, revised July 1948.

Portions of Manual Sections 165-15, 627-00, and 627-25 in conflict with the provisions of this bulletin are hereby superseded.

Very sincerely yours,

Charles I Schottland

Charles I. Schottland

Director

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Charles I, Conschierd Director Certified as a Regulation (or Regulations) of the

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WATE 103, 1035, 103.6, 114 & 2140, 3075 EARL WARREN CHARLES I. SCHOTTLAND Governor

Director

DEPARTMENT BULLETIN NO. 359C (OAS, ANB)

COUNTY BOARDS OF SUPERVISORS COUNTY WELFARE DEPARTMENTS

COUNTY AUDITORS

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE 616 K Street Sacramento 14 May 31, 1950

FILED in the Office of the Secretary of State of the State of California

MAY 31 1950

FRANK M. JORDAN, Secretary of State

Subject: Determination of Assistance Payment OAS - ANB (Medical Care)

Medical Care Allowances

This bulletin expands the provisions of Department Bulletin 359 (Old Age Security, Aid to Needy Blind) relating to medical care and/or treatment under other healing arts and sanitarium or rest home care, and adds policy regarding care in private hospitals and allowances for prepaid medical and hospital care. Policy and regulations contained in this bulletin are to be effective on all actions taken on and after July 1, 1950.

General Policy

1. Definitions

"Medical care as used in this bulletin is defined as including services from physicians, dentists, and nurses, treatment given by a practitioner as defined below; clinic, convalescent and hospital care; drugs and medical supplies; surgical and prosthetic appliances; and other special services, diagnostic X-ray and X-ray therapy, as may be required for diagnosis, care and treatment.

When a recipient is under care or treatment by a physician or surgeon, or by the practitioner of any type of therapy, treatment by prayer or other spiritual means or other treatment recognized as a branch of the healing arts, the cost of such care or treatment represents a "special need" in the amount actually required to purchase such service.

2. Freedom of Choice and Purchase

It is recognized that the recipient is a free agent in the choice and purchase of medical care, and that there are only such protections around the quality of care he buys as are assured to other persons in the community. He may be able to get care at reduced rates or he may pay what everyone else pays, depending upon where he secures his care. After a person goes for treatment, what he actually needs and how much, is determined by the practitioner, medical or other, but he chooses what he will have or what he needs.

3. Verification of Need

Allowance shall be made to cover the actual or allowable cost of treatment or care on the basis of the recipient's oral or written statement of the monthly cost; additional verification shall be requested when the cost as reported by the recipient appears to be excessive. In instances where the recipient cannot give a clear picture of the situation as to the cost of required medical service, care or treatment or the probable duration of the need, further verification through the physician or other practitioner is indicated. Such clearance shall not be made, however, without the consent of the recipient nor without his written authorization to the physician or practitioner to furnish the necessary information.

In some cases, medical care needs and resulting costs are unpredictable because of the nature of the health problem. The recipient should be given a full interpretation of his responsibility in reporting information regarding changes in his medical care situation. When medical services or other treatments are not given on a regular, continuing basis, and the amount of care required varies month by month, allowances for these costs shall be determined as often as required and shall be based on the information reported by the recipient.

When determining medical care needs of a recipient who is under the care of a physician or practitioner, the following information shall be secured through discussion with the recipient and recorded in full in the case record:

- a. Name and address of physician or practitioner.
- b. Nature of illness.
- c. Length of time recipient has been under the care of the physician or practitioner.
- d. Number of visits monthly to physician or practitioner, date of last visit, number of visits during last two months, and cost per visit. Determination shall be made with the recipient as to whether or not medications are furnished by physician or practitioner and included in his charge.
- e. Probable duration of need for care or treatment. Unless there is indication that care will be continuous, a plan shall be made with the recipient for redetermining medical care needs periodically and as often as indicated by the situation,

4. Income required to meet total need

When costs of medical care are paid directly to vendors by others, including relatives of the recipient, all such payments shall be considered income to the recipient, and the care or treatment shall be identified and established as a special need.

Specific Allowances

1. Medication

Prescription and proprietary drugs or other medications are considered special needs when (1) prescribed by a physician or practitioner of the healing arts, and (2) the cost is in addition to the charge for service.

Determination shall be made of the monthly cost of prescribed drugs or medications and allowances shall be made to cover only the period for which needed. There shall be at least an annual redetermination with the recipient of the continued need for the medication. Such redetermination with the recipient shall include consideration as to whether or not the continued use of the medication has been prescribed. When medications are necessary on a continuing basis, and are purchased periodically, the cost is prorated on a monthly basis and the grant need not be adjusted in the month in which it is purchased.

2. Nursing Home, Sanatorium, or Rest Home Care

The cost of Nursing Home, Sanatorium, or Rest Home care represents special need when the recipient's condition requires this type of care, as determined or recommended by the recipient's physician or practitioner. The maximum allowances for nursing home care, as set forth below, take into consideration the fact that the amount charged will vary according to the kind and extent of services needed by the recipient and according to conditions in various areas. (The maximum allowances defined below supersede the provisions of Department Bulletin 359, Item C7(B).)

In order to determine which maximum will apply in a given case, the agency shall secure information from the physician or practitioner as to the kind of care required by the recipient. The nature of the services provided in the nursing home in which the recipient receives care or plans to receive care, and the rate charged shall also be determined. If, in addition to services usually provided, the nursing home also furnishes prescribed medications (prescriptions and proprietary drugs prescribed by physician) for the individual patient, special medical supplies and appliances required by the patient, or physician's services, and the rate is correspondingly higher, allowance may be made for these special needs in addition to the established maximum. Such allowance shall be based on the charge usually made for these services when provided through the nursing home. When the cost of prescribed medication, special medical supplies, appliances, or physician's services is not included in the nursing home rate, an additional allowance may be made based on the cost of the required item as reported by the recipient or other individual meeting the cost of the service.

When the physician or practitioner determines a recipient's condition requires placement in a private room, an additional amount, not to exceed \$50.00, may be allowed to meet the cost for the period this type of accommodation is necessary. If a recipient does not require a private room, but this is the only type of accommodation available, a three months' adjustment period is permitted to enable the recipient to secure care in a ward of semi-private accommodation within the maximum cost allowed for the type of care he requires.

Maximum allowances for nursing home, sanitorium or rest home care

Group I

The maximum allowance for nursing home care for recipients requiring only a minimum amount of care and service, i.e., board, room, laundry, including personal laundry, and some personal service or supervision, shall not exceed \$125.00. An additional allowance of \$20.00 shall be made to meet cost of clothing and incidental needs.

Group II

The maximum allowance for nursing home care for recipients requiring nursing service (rendered by registered or practical nurses), shall not exceed \$165.00. An additional allowance of \$20.00 shall be made to meet cost of clothing and incidental needs.

Group III

The maximum allowance for nursing home care for recipients who are bedfast and require extensive nursing care shall not exceed \$210.00. An additional allowance of \$20.00 shall be made to meet cost of clothing and incidental needs.

When the cost of care exceeds the maxima defined under Groups I, II or III, for the type of care required, a three month adjustment period shall be permitted to enable the recipient to make plans to secure care at a cost within the allowable maximum. If the recipient remains under care beyond the three month adjustment period at a rate exceeding the maximum for the type of care he requires, and the excess cost is met by income to the recipient, including contributions from relatives and direct payment by relatives or others, the amount of the grant shall be determined by applying all income to the maximum allowable cost of established special need.

Example: Mr. A. requires only the type of care provided under the Group II maximum allowance of \$165.00 (plus \$20.00 for clothing and incidental needs) or a total of \$185.00, but is currently receiving nursing home care at a cost of \$200.00. Mr. A. has no additional special needs. Relatives contribute \$125.00 toward cost of care. There is no other income. When this amount is applied to the established total need (\$185.00 the grant is \$60.00.

When it is found that nursing home care cannot be secured within the maximum allowed under Groups I, II, and III, the situation shall be submitted to the State Department of Social Welfare for review.

3. Private Hospital Care

While care in a private hospital is included in allowable medical care, it is limited, in general, to a three month period. If a recipient enters a private hospital for medical or surgical care and the cost is met by income to the recipient, including contributions from relatives or county supplemental assistance, Old Age Security and Aid to Needy Blind shall be granted for three calendar months next following date of admission. If, at the end of this period, the recipient continues to require care in the private hospital, the situation shall be reported to the State Department of Social Welfare for further consideration. Note exception under 4, below.

4. Prepaid Medical and Hospital Care

When a recipient is enrolled in a prepaid medical care plan (e.g., California Physician's Service, Roos-Loos Medical Group, Permanente Health Plan) or in a prepaid hospital service plan (e.g., Blue Cross, Intercoast Hospitalization Insurance) or carries a disability insurance policy, the cost of the monthly fee may be allowed up to a maximum of \$6.00 monthly. The three month rule does not apply to care in a private hospital received under an insurance or other prepaid plan.

5. Nursing Service in Recipient's Own Home

When the provision of nursing service (either by a registered nurse or a practical nurse) permits the recipient to continue living in his own home rather than requiring him to enter a nursing home, an allowance, not to exceed \$165.00 monthly, may be made for nursing service. An additional allowance, not to exceed \$30 monthly, may be made to cover cost of food for the nurse. When the nursing service is provided through a Visiting Nurse Association or similar organization (excluding public health nursing service of public health departments), the usual charge per visit shall be allowed instead. When only short term nursing service is required (i.e., less than 15 days) cost of such service may be allowed in accordance with the usual community rate for such service.

6. Dental Care

The cost of dental care (i.e., extractions, fillings, treatment, X-ray examination, bridge work, dentures, and repair of dentures) shall be allowed on the basis of the recipient's statement as to cost. Additional verification is needed only when the cost as reported by the recipient appears to be excessive.

7. Supplementary Services Related to Medical Needs

The cost of items listed below represent special need when prescribed by a physician or practitioner, on the basis of the recipient's statement as to cost. Additional verification is needed only when the cost as reported by the recipient appears to be excessive.

- a. Laboratory service, X-rays.
- b. Eyeglasses (including charge for refraction).
- c. Hearing aids, trusses, and other prosthetic appliances.
- d. Dressings and other sick room supplies, including wheel chairs, hospital beds, crutches, etc.

Very sincerely yours,

Charles I. Schottland

Charles I Schottland

Director

Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Date)

MANUAL UNIT

1297-1299 CHARLES I. SCHOTTLAND SECRETARY OF STATE

EARL WARREN Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE

616 K STREET SACRAMENTO 14 May 29, 1950 in the Office of the Secretary of State
of the State of California

FRANK M. JORDAN, Secretary of State

MAY 31 1950

DEPARTMENT BULLETIN NO. 339-C (STAT)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Reporting of OAS Discontinuances

Due to Death on Monthly Statistical

Report, Form Ag 237

Department Bulletin No. 417 provides that counties need not submit individual Notices of Change (Form Ag 232) on Old Age Security discontinuances due to death (except in Old Age Security Permanent Sample Cases) on which board action occurred after May 31, 1950. Hence, it will be necessary for the State Department of Social Welfare to receive statistical reports on such discontinuances.

Effective with the report for the month of June 1950 (due not later than July 8), and until further notice, the Monthly Statistical Report on Old Age Security (Form Ag 237) shall be annotated to show the number of discontinuances due to death included in the discontinuances reported in Item 11, "Discontinued during the month." This information shall be reported on line 11 as in the following example:

"ll. Discontinued during month . . . (includes 12 deaths). . 109"

If there were no such discontinuances included the note shall so indicate.

Note that discontinuances, other than inter-county transfers, are to be reported by month of board of supervisors' action rather than by effective date. (See Department Bulletins No. 339 and 339-A.)

Very sincerely yours,

Charles I. Schottland

Charles I Schottland

Director

MAIN OFFICE SACRAMENTO 616 K STREET

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET 12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

Sacramento 14 May 31, 1950

FILED

in the Office of the Secretary of State of the State of California

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California

MAY 31 1950

FRANK M. JORDAN, Secretary of Syste

Dear Mr. Jordan:

Attached are three copies of the following regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 339-C (OAS) Dated May 29, 1950 DEPARTMENT BULLETIN NO. 359-C (OAS, ANB) Dated May 31, 1950 DEPARTMENT BULLETIN NO. 372-B (OAS, ANB) Dated May 3, 1950 DEPARTMENT BULLETIN NO. 404-A (OAS, ANB) Dated May 29, 1950 DEPARTMENT BULLETIN NO. 414 (OAS) Dated April 27, 1950 DEPARTMENT BULLETIN NO. 415 (Fiscal) Dated May 8, 1950 DEPARTMENT BULLETIN NO. 416 (Fiscal) Dated May 31, 1950 DEPARTMENT BULLETIN NO. 417 (OAS) Dated May 31, 1950 DEPARTMENT BULLETIN NO. 418 (Gen) Dated May 31, 1950

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 114b, 115, 116, 118.2, 2140, 2160.7, 2181, 2224, 3044.1 and 3075 on May 25, 1950.

Regulations in Department Bulletin Nos. 339-C, 372-B, 404-A, 414, 416, 417 and 418 are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Mr. Frank M. Jordan -2- 5/31/50

Regulations in Department Bulletin No. 359-C are to be effective July 1, 1950.

Regulations in Department Bulletin No. 415 are to be effective July 15, 1950.

Very sincerely yours,

Charles I. Schottland Director

468:b5 Attachments Karl Warren Covernor

MAIN OFFICE SACRAMENTO 616 K STREET 14

LOS ANGELES OFFICE MIRROR BUILDING 145 SOUTH SPRING STREET 12

SAN FRANCISCO OFFICE GRAYSTONE BUILDING 948 MARKET STREET STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

Sacramento 14 May 31, 1950

IN REPLY PLEASE REFER

Hon. Frank M. Jordan Secretary of State Room 109, State Capitol Sacramento, California FILED
in the Office of the Secretary of State
of the State of California

MAY 31 1950

FRANK M. JORDAN, Secretary of State

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State
Department of Social Welfare with Manual Letter No. 141.

These regulations were adopted by the State Social Welfare Board on May 25, 1950, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, and 114b, and are being filed in accordance with Section 11380 of the Government Code.

The regulations contained in Manual Sections 071-05, 071-10, 071-15, and 152-90 are to be effective July 1, 1950.

The regulations contained in Manual Sections 601-20 and 610-50 are to be effective July 15, 1950.

Very sincerely yours,

Charles I. Schottland

Director

468:b5 Attachments Certified as a Regulation (or Regulations) of the

(Name of State Agency) (Signature) (Title) (Date)

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE 616 K STREET SACRAMENTO 14 June 2, 1950

MANUAL LETTER NO. 141

The attached revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers added (if necessary) and canceled on the separators of the revised chapters. The revision numbers are as follows:

Welfare Personnel Standards Income Financial Procedures

Revision 90 through 93 Revisions 73 through 76 Revisions 494 through 496

These revisions were adopted by the Social Welfare Board on May 25, 1950, and are effective as follows:

July 1, 1950	July 15, 1950
071-05	601-20
071-10	610-50
071-15	
152-90	
645-24	

Sec. 071-05 has been revised to incorporate the salary schedule contained in Department Bulletin No. 411.

Sec. 071-15 as revised provides that with the exception of promotions, transfers, or reinstatements, no original appointment may be made beyond the third step of a salary range. If a salary range for a classification is changed, any necessary adjustment in salary rate shall not exceed the equivalent of a three-step increment. The provision permitting the retention of salaries in excess of the maximum of the salary range has been deleted.

Sec. 152-90 has been revised to provide a more objective method of evaluating contributions in the form of free rent, free utilities, and free room and board.

Revised regulations for fund designation on warrants have been incorporated into Sec. 610-50. They provide that warrants may not bear program titles or program abbreviations, but that codes designating program may be used. The paragraph of Sec. 601-20 regarding fund designations on warrants has been deleted.

Sec. 645-24 regarding federal participation in expenses of the county treasurer has been deleted.

Beginning with these manual sections transmitted herewith, references to ANC are being deleted from revised pages which contain material now included in the separate Manual of Policies and Procedures - Aid to Needy Children.

Department Bulletins Nos. 411 and 415 are now obsolete. Item G of Department Bulletin No. 359 (included in Department Bulletin No. 394) is obsolete.

071-05	SALARY	SCHEDULES
	WPS	

071-05

CLASSIFICATION	SCHEDULE OF STEPS										
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
County Welfare Director V	415	439	464	491	519	549	581	614	649	686	725
County Welfare Director IV	351	371	392	415	439	464	491	519	549	581	614
County Welfare Director III	297	314	332	351	371	392	415	439	464	491	519
County Welfare Director II		266	281	297	314	332	351	371	392	415	439
County Welfare Director I	201	213	225	238	252	266	281	297	314	332	351
Assistant County Welfare Director	332	351	371	392	415	439	464	491	519	549	581
Public Assistance Supervisor, Grade II	281	297	314	332	351	371	392	415	439	464	491
Public Assistance Supervisor, Grade I	238	252	266	281	297	314	332	351	371	392	415
County Child Welfare Supervisor, Grade II	281	297	314	332	351	371	392	415	439	464	491
County Child Welfare Supervisor, Grade I	266	281	297	314	332	351	371	392	415	439	464
Child Welfare Services Worker	213	225	238	252	266	281	297	314	332	351	371
Public Assistance Worker, Grade II	190	201	213	225	238	252	266	281	297	314	332
Public Assistance Worker, Grade I	170	180	190	201	213	225	238	252	266	281	297
Chief Bookkeeper Clerk	238	252	266	281	297	314	332	351	371	392	415
Senior Bookkeeper Clerk	190	201	213	225	238	252	266	281	297	314	332
Junior Bookkeeper Clerk	161	170	180	190	201	213	225	238	252	266	281
Senior Stenographer Clerk	190	201	213	225	238	252	266	281	297	314	332
*Intermediate Stenographer Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Stenographer Clerk	144	152	161	170	180	190	201	213	225	238	252
Senior Typist Clerk	180	190	201	213	225	238	252	266	281	297	314
*Intermediate Typist Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Typist Clerk	144	152	161	170	180	190	201	213	225	238	252
Chief Clerk	225	238	252	266	281	297	314	332	351	371	392
Senior Clerk	180	190	201	213	225	238	252	266	281	297	314
*Intermediate Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Clerk	144	152	161	170	180	190	201	213	225	238	252
Receptionist	161	170	180	190	201	213	225	238	252	266	281

*When, as, and if intermediate classes are created.

The above salary schedule shall be effective the same date the county budget and/or salary ordinance becomes effective for the fiscal year 1950-51. For modification procedure see Sec. 071-10, Adoption of Compensation Plan (Walc 119.5, 119.6)

070-75 CLASS SPECIFICATION WPS

070-75

For each class specification established by the SSWB, the SDSW shall maintain official class specifications as approved by the SSWB.

- 1. Official class title.
- 2. Definition of the class, indicating, in terms of duties responsibilities, and/or place in the organization, positions to be included in and excluded from the class.
- 3. Statement of typical tasks to be performed by those holding positions allocated to the class.
- 4. Statement of minimum qualifications for determining fitness and qualifications of employees for each class of position and for temporary appointments and for applicants for examinations, which may include education, experience, knowledge, skills, ability and personal and physical traits and characteristics.
- 5. Additional qualifications considered so desirable that any person considered for employment who possesses them may be given additional credit in evaluation of his qualifications, even though such additional qualifications are not a prerequisite to consideration for employment.
- 6. The adopted schedule of pay for the class. (W&IC 119.5, 119.6; FSS-ADMIN.)

071-00 ESTABLISHMENT OF COMPENSATION PLAN

071-00

The SSWB shall adopt a comprehensive compensation plan for all classes of positions. The plan shall include salary schedules for the various classes with salary of each class consistent with responsibility and difficulty of work as outlined in job specifications and shall be based on the principle that like salaries shall be paid for comparable duties and responsibilities in like counties. With the restriction of Sec. 071-20, Salary Advancements, such compensation plan shall include for each class of position, a minimum and a maximum rate, and three intermediate rates to provide for steps in salary advancement without change of duty in recognition of meritorious service. In arriving at such salary ranges there shall be taken into consideration the advice and suggestions of appointing authorities and county officials, county ordinances or other laws, and prevailing rates of pay in other public employment and in private business, and the current cost of living. (WGIC 119.5, 119.6; FSS-ADMIN.)

071-15 (Continued)

071-15

If circumstances warrant, upon the written request and justification by the appointing authority and with the prior written approval of the SDSW in cases of transfers, promotions, or reinstatements upon recommendation of appointing authority, the SDSW may approve payment of a salary at more than one step above the minimum rate for the class, provided that it is at one of the intermediate rates or at the maximum rate, but not in excess of the maximum rate for the class.

Original appointments may be made at the third step of the approved salary range of the class providing that prior to appointment the appointing authority submits adequate justification in writing to SDSW based on the prevailing rate of pay for that type of work in the county, or on specific evidence that the third step of the approved salary range must be offered in order to recruit and retain qualified employees. In such cases, the conditions specified in this section, sub-paragraphs (1) and (2), shall apply. Original appointments may also be made at the third step of the approved salary range for the class, provided the appointing authority submits prior adequate justification in writing to the SDSW based on the exceptional qualifications of the employee as shown through the following: Meritorious service in a comparable or higher class of position in a social work agency having personnel standards with respect to selection and tenure comparable to those of the California County Merit System.

With the exception of promotions, transfers, or reinstatements, no original appointment may be made beyond the third step of the salary range.

If an employee is promoted to a higher classification by means of certification or non-competitive promotion, he is entitled to receive the minimum rate of pay of the higher classification or the rate of pay identical to that which he received prior to his promotion, providing such rate of pay is equal to or higher than the minimum rate of the higher classification, or he may be advanced to the next higher step in the salary range of the higher classification.

If the salary range of a given classification is changed, the employees in this classification shall receive the rate of pay within the new salary range identical to that which they were receiving prior to such change in the salary range, or in the event the rate of pay received prior to the change in the salary range does not fall on a specific step of the new salary range, they may be advanced to the next higher step or reduced to the next lower step in the new salary range. In no instance shall an upward or downward adjustment in salary rate exceed the equivalent of a three-step increment under the new plan between the salary rate previously received and the salary rate to be received under the new range, including the granting of an annual salary increase.

Specific amounts of bonus or percentage increases to compensate for increased cost of living shall not be added to the approved salary ranges. If a bonus or percentage salary increase plan is in effect in a county, or if said amount is changed with respect to all county employees, the county welfare department may adjust its salary rates within the compensation plan to a rate which most nearly includes the bonus or percentage increase granted to other county employees.

(Section Continued on Next Page)

071-10 ADOPTION OF COMPENSATION PLAN

071-10

Each county must adopt a five consecutive step compensation plan from among the schedule of eleven salary steps shown in Sec. 071-05, Salary Schedules. The same corresponding five salary steps must be used for each classification used in the county welfare department. Official notification of the steps selected shall be forwarded to the SDSW, showing the date of adoption and the effective date of the plan.

In order to meet operating needs the board of supervisors may increase or decrease the salary schedules adopted by the county provided that five new consecutive steps are selected from the schedule of steps outlined in Sec. 071-05. Such changes shall be reported to the SDSW, showing the date of adoption by the board of supervisors, and the effective date of the new salary schedules. Any salary adjustments necessitated as a result of new salary schedules shall be in accordance with Sec. 071-15. Administration of Compensation Plan.

In lieu of the salary schedules outlined in Sec. 071-05, any board of supervisors may submit to the SSWB for approval for use in the county welfare department, salary ranges in a county-wide compensation plan based upon a factual and competent salary and classification survey. In all other respects, such a plan and its administration shall be in accordance with the above provisions. (WAIC 119.5, 119.6)

071-15 ADMINISTRATION OF COMPENSATION PLAN

071-15

The compensation plan shall constitute the official schedule of all salaries for all classes of positions in the county agencies. All salaries shall conform to the approved compensation plan and shall be at one of the salary levels for the class. Entrance salary for any employee shall be at minimum salary for the class to which he is appointed except that appointments may be made at one step higher than the minimum salary of the compensation plan as adopted and in effect for that county agency to which employee is appointed, provided the following conditions apply:

- 1. No original appointment shall be made at a salary higher than the minimum of that class unless all persons standing higher on the eligible list who have been offered the appointment, are first offered the higher rate.
- 2. If an original appointment is made at a salary higher than the minimum of that class, all employees in the same class in that county agency shall be at the same or at a higher rate in the salary range at which the original appointment is made, unless the original appointment at a salary higher than the minimum for that class has been justified in accordance with this section.

(Section Continued on Next Page)

071-50 CHARACTER OF EXAMINATIONS WPS

071-50

Examinations may be written, or written and oral, or in the form of a practical demonstration of skill and ability or any combination of these. Any investigation of education, experience, character, or identity, and any test of technical knowledge, manual skill, or physical and mental fitness which, in the judgment of the examining agency, serve to this end, may be employed.

Examinations shall be practical in nature, and shall be constructed to reveal the capacity of the applicant for the particular position for which he is competing as well as his general background and related knowledge. Examinations shall be rated objectively. In the construction of examinations for positions involving important technical functions, the examining agency shall consult with the SDSW and specialists in the various subject matter fields, such specialists selected with the advice of the SDSW. (W&IC 119.5, 119.6; FSS-ADMIN.)

071-55 TYPES OF EXAMINATIONS WPS

071-55

Examinations shall be of two types: (a) qualifying and (b) competitive, consisting of open competitive and promotional.

Qualifying examinations shall be open to the personnel of county agencies who have been continuously employed since a date prior to January 1, 1940. Each such person shall take the examination for the class to which his position is allocated by the SSWB and must attain the required standard of proficiency in order to retain his present position. Such employees will not be obliged to meet the entrance requirements established for their positions as described in Sec. 074-10, Employees Appointed Prior to Date of Adoption of These Rules.

Open competitive examinations shall be open to all persons who meet the entrance requirements established for the examinations. (W&IC 119.5, 119.6, FSS=ADMIN)

071-15 (Continued)

071-15

An employee who is demoted shall have his salary reduced to at least the maximum rate for his new class; provided that if his salary, before demotion, is within the range of the new class, then his salary may remain at the same rate or the next lower step of the new class. In the event that the salary range for the lower class is at different rates, then the new salary for the lower class shall be at the rate next lower than the salary before demotion.

An employee who is transferred to a position in a class with same entrance salary shall be paid at his present rate, or at next higher rate in case there is not exact conformity between the two intervening rates in salary ranges of the classes.

If a former employee is reinstated in the same position previously held or to one carrying a similar salary range, his salary shall not be higher than his salary at the time of his separation, unless there has been an increase within the salary range. (WAIC 119.5, 119.6; FSS-Admir.)

071-20 SALARY ADVANCEMENTS

071-20

Salary advancements shall not be automatic but shall be dependent upon the specific recommendation of the appointing authority and shall be based upon standards of performance as indicated by seniority and service ratings or other pertinent data. Such advancements shall ordinarily be given at one-step-intervals once a year with the following exception:

Salary advancements given more frequently than once a year or at more than one-step-intervals shall be permitted only upon the written request and justification by the appointing authority and with the prior written approval of the SDSW but in no case shall such advancements be given at intervals of less than three months except in cases of extraordinary emergency.

All salary advancements shall remain within the salary range for the class and shall be at one of the salary levels for the class.

Regular annual or semi-annual periods following the filing of service ratings of employees shall be established for review of all employee records for the purpose of salary advancements. (W&IC 119.5, 119.6; FSS-Admin.)

152-90 (Continued)

152-90

II. FREE UTILITIES

If all utilities are included in the free shelter provided, \$6.30 shall be added to the value placed on the free rent. Thus, for free rent and free utilities the value to be used if housing is set at the minimum amount, shall be \$11.30 a month; if housing is set at the intermediate amount, \$16.30 a month; and if housing is set at the maximum amount, \$21.30 a month.

III. FREE ROOM AND BOARD

If free room and board are provided, the individual ordinarily has no expense for household maintenance and replacements; in which case the value for room and board shall be the sum of the values placed on free rent (\$5, \$10, or \$15), free food (\$28.50), free utilities (\$6.30), and household maintenance and replacements (\$4.50). If the room and board does not include all of these items, the total value of the items which are included shall be regarded as the value of the room and board. (Walt 2140, 3075, 3460)

153-10 GIFTS AS INCOME OAS, ANB, APSB

153-10

Gifts in cash or the value of items of support in kind such as board, room, clothing, etc., received from others, including public or private agencies, fraternal, benevolent and non-profit organizations, or private institutions having no legal obligation for support, represent income. In OAS and ANB gifts which have no significance in meeting the continuing needs of the recipient and which have been determined to represent casual income shall not be considered in determining the grant of aid. In APSB, when gifts are received the value thereof is subject to the \$800 exemption. (See Secs. 150-50, Types of Casual Income, and 152-60, Offer of Support as Income.) Gifts of items of personal property such as the gift of a radio, refrigerator, chair, etc., do not represent income. (WRIC 2020, 2040, 3075, 3084, 3460. 3472)

153-40 INCOME FROM COURT ORDERS OAS, ANB, APSB

153-40

When there is a court order for full or partial support of the applicant or recipient he shall be presumed to have income in the amount awarded by the court. This presumption shall be considered to have been rebutted where the amount received as a result of the court order is less than the amount so ordered and only the amount received shall be considered income.

The case record shall show the date and provisions of the court order. When a determination is made that no amount or a lesser amount than that awarded

(Section Continued on Next Page)

152-90

152-90 VALUE OF CONTRIBUTIONS IN KIND OAS, ANB, APSB

The value placed upon rent, utilities, food, or other items of support contributed in kind to an applicant or recipient shall not be in excess of an amount which will permit the recipient to meet his other needs such as incidentals, transportation, etc.

The following factors shall determine the monetary value of shelter and utilities and room and board for which the applicant or recipient is not required to pay because they are furnished by relatives, employers, or others:

I. FREE RENT

If an applicant or recipient is in receipt of free rent, the value placed thereon shall not be less than \$5 nor more than \$15. Within these minimum and maximum amounts, the value placed upon the shelter furnished without cost to any given applicant or recipient shall be determined by taking into consideration both of the following factors:

- A. Comparable rental costs in the community. In no instance shall value placed upon free rent furnished an applicant or recipient exceed the rental charged for comparable shelter in the same community, except that the minimum amount set in the standard may not be reduced.
- B. Adequacy of housing. The following definitions of sub-standard, intermediate, and standard housing shall be used to determine the degree of adequacy of the housing provided an applicant or recipient:
 - 1. Sub-standard housing—a dwelling or a room which does not have adequate sanitary facilities, safety provisions, or any of the other factors mentioned below.
 - 2. <u>Intermediate housing</u>—a dwelling or a room which does not have adequate provisions for privacy and comfort, but where there are adequate sanitary facilities and safety provisions.
 - 3. Standard housing—a dwelling or a room which meets minimum standards of health, safety and decency, including such items as adequate privacy, sanitary facilities, and comfort.

In making the determination of the value to be placed on free housing, based upon a combination of the factors of comparable rental costs and adequacy of housing, one of three monetary amounts shall be used: the minimum amount set forth in the standard (\$5); the intermediate amount in the standard (\$10); or the maximum amount set forth in the standard (\$15).

The basis for the determination of the value placed on free rent shall be recorded in the case record.

(Section Continued on Next Page)

153-50 (Continued)

153-50

When a recipient of aid is known to be a dependent of an inmate employed in a State Prison road camp or under provisions of Sec. 2780 of the Pen. C., the county shall verify the amount of allotment, if any.

Dependents are relatives for whose support the convict is legally responsible. See Sec. 170-00, Relatives - Statutory Provisions.

When a responsible relative is an inmate of a State penal institution, the county shall inform the institution that the inmate has a dependent who is receiving aid. Notification of any assignment to a road camp or under the provisions of Sec. 2780 of the Pen. C. shall be requested.

When a responsible relative is in a prison road camp the county shall advise Prison Camps, Division of Highways, P.O. Box 1499, Sacramento, California, of the name of the recipient to whom the allotment shall be paid.

When the county is advised by a penal institution that an immate is employed under the provisions of Sec. 2780 of the Pen.C. and of the amount credited to the dependents, the county shall, in turn, give the warden or superintendent of the penal institution the name of the person to whom the allotment shall be paid.

The county shall notify Prison Camps, Division of Highways, or the penal institution when aid is discontinued for a person receiving mandatory allotments from an inmate's road camp earnings or under provisions of Pen. C. Sec. 2780.

Allotments are usually not available until the prisoner has been in camp four months. Allotments are not regular, and are variable in amount, depending upon the number of days worked, cost of maintenance and deductions for commissary purchases.

In OAS, ANB, and APSB allotment checks shall be made out by the Department of Public Works or the penal institution to the recipient of aid.

Allotments to persons, other than responsible relatives, are voluntary and are initiated solely on the request of the prisoner himself. After the prisoner signs the form requesting such an allotment Prison Camps, Division of Highways, or the penal institution obtains an affidavit from the allottee giving the relationship to the prisoner.

Information regarding voluntary allotments in an individual case may be obtained from Prison Camps at the above address or from the warden or superintendent of the penal institution for inmates employed under Sec. 2780.

The county is notified of date and amount of each allotment check by the State Department of Public Works or the penal institution. The county is also notified when the prisoner leaves camp. (Wall 2140, 3075, 3088, 3460, 3474)

153-40 (Continued)

153-40

by the court is received, the case record shall show the facts upon which that determination is based. The following situations although not necessarily allinclusive, would indicate the receipt of a lesser amount than that awarded by the court:

> 1. A showing that the court order is not enforceable because the person ordered to pay is unable to do so;

2. The court granting the award no longer has jurisdiction;

3. A showing that a request has been made of the court for enforcement of the order. (W&IC 2140, 3075, 3460)

153-50 ALLOTMENTS FROM INMATES OF PENAL INSTITUTION GAS, ANB, APSB

153-50

Allotments from inmates of penal institutions as provided in Secs. 2763 and 2780 of the Pen. C. shall be considered as income in the month received and adjustment of the grant made according to the policy of the respective category of aid.

Sec. 2763 of the Pen. C. requires that the State Department of Public Works shall pay the dependents on OAS, ANB, or APSB, of an inmate employed in a State prison road camp, a monthly sum from the net credit to each inmate's account as provided below. The amount paid shall be that which the State Department of Public Works estimates will equal, but not exceed, two-thirds of his total credit during the period of his employment. Immediately prior to, or upon the termination of, the employment of any inmate for any reason, any additional payment necessary to bring the total amounts paid to such dependents up to twothirds of the inmate's net credits shall be made. No payment shall be made to dependents until there is a net credit to the inmate's account of at least \$25. No payment shall be made to dependents which will reduce the net credit below the sum of \$25. When an inmate's dependents are not receiving aid the inmate may voluntarily designate the persons to receive his allotment.

Under the provisions of Sec. 2780 of the Pen.C., the Divisions of Forestry, Parks, and Fish and Game of the Department of Natural Resources and the Division of State Lands in the Department of Finance may use inmates of State penal institutions in camps. Federal officials may also use inmates of State penal institutions to perform necessary and proper work in national forests and parks.

When inmates are paid for their labor under Sec. 2780 of the Pen. C., the Prison Board shall monthly pay two-thirds of the net credit to each inmate's account, to those dependents who are receiving OAS, ANB, or APSB. When the dépendents are not receiving one of these forms of aid such inmate may, by signing a written order, direct the Prison Board to pay an amount, not exceeding twothirds of his net credit to such dependents as he designates, according to Pen. C., Sec. 2784. It further provides that when an inmate is discharged, while at a camp, all sums due him shall be paid upon release. When an inmate is returned to a penal institution or released on parole, his net credits shall be paid to the warden of his penal institution and by him paid to the inmate, as prescribed by the Prison Board.

The California Institution for Men at Chinois the only penal institution which has a forestry camp at present. Pending establishment of other camps, Folsom, San Quentin and the road camps connected with these institutions are assigning inmates to combat fires in emergencies on a day to day basis.

(Section Continued on Next Page)

REVISION 75

Revised March 23, 1950

601-20 USE OF STATE AND FEDERAL FUNDS OAS, ANB, APSB, ANC

601-20

Moneys in possession of a county representing amounts advanced by the state and Federal governments for the payment of OAS, ANB, APSB, ANC, and county administrative expense are accountable to the SDSW and the FSS-Administration. Therefore, special funds or special separate accounts should be set up to record the receipt of such moneys and transfers or disbursements therefrom. These funds are subject to audit by the state and Federal auditors. (W&IC 1553, 1554, 2186, 2187, 3087, 3087, 3087, 3087, 3087, 3087).

601-30 SUBMISSION OF QUARTERLY ESTIMATE OF EXPENDITURES FOR AID AND ADMINISTRATION OAS, ANB, APSB, ANC

601-30

Two copies of the Claim for Estimated Quarterly Expenditures (Form Ag, Bl, CA 809) should be mailed to the SDSW in time to be received not later than two and one-half (2 1/2) months prior to the beginning of the quarter covered by the estimate.

Example:

			Covered By for Expenditures	Must Be In SDSW Office By				
April 1		16	March 31, 1948 June 30, 1948 September 30, 1948 December 31, 1948	October 15, 1947 January 15, 1948 April 15, 1948 July 15, 1948				

It is imperative that the claims be received on or before the due date in order that the (OAS, ANB, APSB, and ANC) Claim for Estimated Quarterly Expenditures may be prepared and forwarded to the Federal Social Security Administration. If any county is late in submitting its estimate claims, the request for Federal funds for the entire state is delayed. (WAIC 1560, 2140, 3075, 3460)

601-00

601-00 QUARTERLY ESTIMATES OF EXPENDITURES FOR AID AND ADMINISTRATION OAS, ANB, APSB, ANC

Each county is required to submit a Claim for Estimated Quarterly Expenditures so that a determination can be made by the state of the amount of Federal, state and county moneys that are to be available for the payment of OAS. ANB, APSB and ANC warrants for a given period. After the estimates have been received from all counties and are audited by the state, a recapitulation is made of all counties and a Claim for Estimated Quarterly Expenditures prepared and forwarded to the Federal Social Security Administration requesting Federal funds to cover the estimated Federal share of assistance and administrative expense for all counties in the State of California. (See Secs. 601-30 through 601-60 for instructions in preparation of reports.)

State and Federal funds are forwarded to the counties monthly in advance by the State Controller's Office. The amounts advanced are based upon the Claim for Estimated Quarterly Expenditures (Form Ag, Bl, CA 809) as adjusted by the SDSW for the differences between estimates and aid claims for the second prior quarter. (W&IC 1555, 1560, 2140, 2183, 3075, 3087.2, 3460, 3481)

601-10 QUARTERLY ADJUSTMENT OF FUNDS OAS. ANB. APSB. ANC

601-10

Upon approval by the SDSW of the three monthly claims for aid and administrative expenditures covering a particular quarter, an adjustment of the differences between the expenditures of Federal and state funds as estimated for the quarter and the total of all audited claims for the same quarter is made.

If there is an excess in the estimate over the expenditures for the same quarter, this amount is deducted from the first monthly advance of the second subsequent estimate filed. If there is a deficiency in the estimate under the expenditures, this amount is added to the first monthly advance of the second subsequent estimate filed. When an adjustment occurs requiring a deduction greater than the first monthly advance, the adjustment is applied to subsequent advances until the total deduction had been effected. If the adjustment is greater than the estimate filed, the county is requested to forward to the SDSW a county warrant, payable to the Treasurer of the state for the balance of the adjustment. (W&IC 1555, 2188, 3087.2, 3481)

610-40 (Continued)

610-40

ANC payments shall be made to the person or institution providing care for the children on whose behalf the grant is made. If ANC is paid on behalf of children who are wards of the juvenile court, the payments may be made to the probation officer. If payments are made on behalf of a parolee from the California Youth Authority for whom the parole officer signed the application, the warrants shall be made payable to, and mailed to, the relative if the child is living with a relative eligible under the Social Security Act, or, if the child is living in a boarding home, the warrant shall be made payable to the boarding home mother and shall be mailed in care of the area office of the California Youth Authority. (See Sec. 628-00, Payees Eligible Under Social Security Act.) (WAIC 1556.5, 1557, 1560, 2140, 2183, 3075, 3460; FSS-Admin.)

610-50 IDENTIFICATION ON WARRANTS OAS, ANB, APSB, ANC

610-50

The payee's name shall appear on the warrant exactly ashis signature appears on the application (Form Ag, Bl, CA 200), on the Summary of Letters of Guardianship (Form DPA 5) or, in ANC, on the latest Notice of Change (Form CA 232). (See Sec. 202-20, The Application Form.) Exception: If the county's disbursement procedures make it difficult to use the full first name, the initial only may be shown on the warrant.

The state number assigned to the case may appear on the face of the warrant for further identification. It shall be used with the name in all correspondence, reports, records, and other data regarding the warrant.

Warrants drawn in payment of OAS, ANB, APSB, and ANC shall not carry any reference to indigency or pauperism and shall not include any word or abbreviation indicative of aid, assistance, charity, needy, support, welfare, or words or abbreviations of similar connotation. The program titles Old Age Security, Aid to Needy Blind, Aid to Partially Self-supporting Blind Residents, and Aid to Needy Children and the abbreviations OAS, ANB, APSB, and ANC shall not appear on the warrant nor shall the fund designation appear on the warrant if it includes such words as welfare, security, relief, indigent, etc. (See Sec. 102-20, No Pauper Designation)

For identification purposes within the county government such warrants may carry a code letter or number provided such code is not generally understood by the public. The following codes are recommended:

A - Old Age Security

B - Aid to Needy Blind

P - Aid to Partially Self-supporting Blind Residents

C - Aid to Needy Children

If case numbers are written on the warrant by typewriter or other mechanical process, such numbers may include the program suffix as Ag for OAS, Bl for ANB and APSB, and CA for ANG.

It may also be helpful to use warrants of different colors or tints for the various programs such as buff for OAS, green for ANB and APSB, and blue for ANC. (Welc 118.2, 1560, 2009, 2140, 3002, 3075, 3401.5, 3460; FSS-Admin.)

610-30

610-30 AUTHORIZATION FOR PAYMENT OAS, ANB, APSB, ANC

Action of the board of supervisors granting, restoring, increasing or decreasing assistance constitutes the final action which unconditionally authorizes payment to be delivered to the specified payees. Such action authorizes delivery of the payment immediately, except where a future date is specified. With respect to continuing grants, the first day of each month (as provided by law) is the effective date of the continuing authorization for payment.

Likewise, when aid is granted pursuant to an order of the SSWB (after a hearing on appeal), the action of the board of supervisors by which the SSWB's order is executed constitutes the final action which unconditionally authorizes payment to be delivered to the appellant. The SSWB, when ordering aid paid on an appeal, in effect remands the case to the board of supervisors who alone have the power to direct disbursement of funds from the county treasury.

The authorization is mandatory with respect to its execution, except where payment of aid is withheld or suspended because of a cloud on eligibility. (See Sec. 361-30, Suspension Procedure.)

For the purposes of establishing the applicant's or recipient's accrued period of eligibility, and of computing the amount of payment due, the board of supervisors authorization for payment of retroactive aid includes a determination of such retroactive period. (See Sec. 361-25, Retroactive Aid Payments by County.) This period, however, has no bearing on the effective date of the authorization for payment. (WAIC 1560, 2140, 2181, 3075, 3460)

610-40 RECIPIENT OF PAYMENT OAS, ANB, APSB, ANC

610-40

Payments of security or aid shall be made directly to the grantee or authorized payee, except under certain conditions following death when the provisions of Secs. 611-00, Payment When Grantee Dies, and 611-10, Payments When Child Dies, shall be followed.

In OAS, ANB, and APSB, when a guardian is the payee, Summary of Letters of Guardianship (Form DPA 5) shall be on file with the SDSW. In ANB and APSB where the grantee is a minor and the guardian is the natural parent, letters of guardianship are not required. (See Sec. 626-20, Identification on Aid Pay Rolls.) The guardian's name shall appear on the pay roll together with the name of the grantee.

(Section Continued on Next Page)

645-25 EXPENDITURES FOR CWS

645-25

CWS Workers

In those counties where agreements have been approved for the employment of CWS workers, the total salary received by those workers shall be charged to the CWS Program.

Reimbursement to the county from CWS funds will then be computed on the percentage of the CWS worker's salary specified in the agreement between the state and county.

CW Supervisors

In those counties where agreements have been approved for the employment of a County Child Welfare Supervisor or County Child Welfare Supervisor Grade I or County Child Welfare Supervisor Grade II (if and when these two latter classifications are approved by the U. S. Children's Bureau) and the agreement specifies that such supervisors may work less than full time on CWS, the amount of such supervisors' salaries charged to CWS shall be determined on the basis of time actually spent during the month on activities specified in the agreement between the SDSW and the county.

(Section Continued on Next Page)

645-22 EXPENSES OF COUNTY BOARD OF SUPERVISORS OAS, ANB, ANC

645-22

Federal participation may not be claimed by the county for expenses of the county board of supervisors since they are not administrative costs of the public assistance agency but rather costs of general county government. (FSS-Admin.) 645-23 EXPENSES OF THE COUNTY DISTRICT ATTORNEY OR

645-23

OTHER COUNTY CIVIL LEGAL OFFICER

OAS, ANB, ANC

Services performed by the district attorney or other county civil legal officer are generally matchable if performed as an aid to the operation of the welfare department, the service being of a kind for which the welfare department would normally turn to its own staff attorney. Only the direct cost of those services which are specifically identifiable as services to the welfare department are matchable. Whether such services are performed in the office of the district attorney or other county civil legal officer or on the premises of the welfare department is immaterial.

The nature and identifiability of the service governs the matchability.

In all instances the services from the district attorney or other county civil legal officer need to be known in some detail so that those that are matchable may be separated from those that may be performed by the district attorney or other county civil legal officer in his capacity of officer of the county.

Certain specific services such as formal consultation on policies procedures are matchable. In this regard the district attorney or other county civil legal officer would be acting in an advisory capacity to the welfare department in the same way as an attorney on the agency's staff.

Services that are performed by the district attorney or other county civil legal officer and that fall within the general administrative responsibilities of his office are not matchable as, for example, formal opinions on the constitutionality of legislation, defending the welfare department in nonprogram litigation, or the rendering of opinions as a part of the general function of the office of the district attorney or other county civil legal officer. Such services usually would be required of the district attorney or other county civil legal officer for all the county agencies and departments and would not be performed solely for the welfare department.

Charges shall be confined to the cost, to the district attorney or other county civil legal officer, of the time of the personnel, of materials used, and of expenses incurred as the direct result of furnishing the services. Overhead, such as office rent, library facilities or the cost of general management of supervision shall not be included.

The SDSW shall be consulted regarding the specific cost allocation plan to identify the above costs.

Costs shall be reported currently and shall be identified as an expense of the county district attorney or other county civil legal officer when itemized on the Administrative Expense Worksheet (Form DFA 64A) submitted to the SDSW with the Administrative Expense Affidavit (Form ABC 807). The county shall maintain records to substantiate these costs. (FSS-Admin.)